

Appendix 1

ASC Scrutiny Commission

Date: 14th August 2014

Evaluation of EPH Residents Moving Under Phase I

Lead Director: Tracie Rees



City Mayor

Useful information

- Ward(s) affected: New Parks and Westcotes
- Report author: Tracie Rees
- Author contact details: Tracie.Rees@leicester.gov.uk
- Report version number: 1.2

1. Summary

- 1.1 The report updates the Scrutiny Commission on the perceptions of residents four weeks, after their move from Elizabeth House and Nuffield House.
- 1.2 Elizabeth House closed on 15th April 2014 and Elizabeth House close on 4th June 2014. Herrick Lodge is still open pending a legal challenge.
- 1.3 A number of questions were posed to residents by their Social Worker as part of a planned follow up review, approximately four weeks after the move. Family members also attended the review meeting in some cases.
- 1.4 This report summarises the overall findings from residents' interviews. Appendix A shows whole extracts from individual interviews, which were undertaken. The information has been redacted to prevent individuals from being identified and to remove reference to confidential and sensitive health data in order to maintain compliance with the Data Protection Act 1998 (Amendment 2003).

2. Recommendations

- 2.1 The Scrutiny Commission is recommended to:
 - a) Note the positive findings from resident responses four weeks after moving
 - b) Note the reasons for any dissatisfaction identified at this stage and the mitigating actions that have been undertaken

3. Supporting information including options considered:

- 3.1 On 15th October 2013, the Executive made a decision to close Elizabeth House, Nuffield House and Herrick Lodge as part of Phase I, of the Elderly Persons Homes Re-provision Process.
- 3.2 Elizabeth House and Nuffield House have now closed, and all residents have been supported to move to new homes. Herrick Lodge is still open to four permanent residents as part of Phase I, pending the outcome of a legal challenge. In making a decision to close the homes in Phase I, the Executive made it clear that an evaluation of Phase I would be needed before any decision to proceed to Phase II is made.
- 3.3 This report updates the ASC Scrutiny Commission on the results from interviews

carried out as part of the formal four week review process for residents who have moved from Elizabeth and Nuffield House. A separate report will be submitted at a later date for residents that have moved out of Herrick Lodge.

Person Centred Change

3.4 It can be concluded from these interviews that that the process of sensitively supporting residents to move has been successful and that this is apparent from the overall findings and from the individual interview extracts in Appendix A.

3.5 A person centred approach was developed to support the re-provision process, aimed at reducing the anxiety that those involved would naturally feel. The approach was based on working with each resident and/or those who are important to them, to develop an individual moving plan. The moving plan was updated at key points. Residents and relatives were supported throughout the process by a dedicated social work team which provided continuity of support. The approach can be summarised in seven key steps and was explained to residents and families in a user friendly leaflet.

Step One	Deciding who needs to be involved in the moving plan
Step Two	A meeting to look at what is most important to each resident about moving to a new home
Step Three	A reassessment of each individual's needs, undertaken by a social worker
Step Four	A meeting to review an individual's moving plan following the reassessment of needs
Step Five	Planning the move day and developing a checklist of actions to make sure the move goes smoothly
Step Six	Making sure that everything the resident has asked us to put in place has been arranged on the day of the move
Step Seven	Putting in place the checks residents asked for in the weeks following the move and then carrying out a formal review of each residents' needs four week after moving

Profile of residents who took part in the interviews

3.6 A total of 25 residents were supported to move from Elizabeth House and Nuffield House.

- 19 people took part in the questions prior to moving
- 20 took part in the questions after moving
- 1 person moved before the interview questions were drawn up. The person moved quickly due personal reasons (They did however take part in the second interview)
- 1 person did not agree with answering questions after moving
- 1 person did not participate due to health reasons
- 1 person did not participate due to being in hospital
- 2 people who were supported to move have since died.

Methodology and Evaluation Approach

- 3.7 Before each resident moved, they were asked by their Social Worker to answer 5 key questions about their current home. The same questions were asked at the four week review in relation their new home.
- 3.8 During both sets of interviews people were also asked about the nature of any concerns they had.
- 3.9 Prior to moving, people were asked whether everything they said they had wanted in their moving plan had been put in place.
- 3.10 After moving people were asked to describe the extent to which they felt they were settling in.
- 3.11 Of the 20 residents who told us their views 4 weeks after moving, 8 moved to homes in the independent and voluntary sector, and 12 residents moved to vacancies in other council homes.
- 3.12 The overall results of this exercise are shown in the table in part 3.15 of the report.
- 3.13 Evaluating a qualitative exercise like this is not a straightforward process. For the purposes of this evaluation, advice from the Corporate Research and Intelligence Team has been that there is no standard measure. Whilst it is helpful to report overall findings in numerical terms this should be considered in the context of the responses people have given, both positive and negative. Responses indicating dissatisfaction should be subject to an impact assessment and measures to mitigate the issues raised.
- 3.14 On this basis the report shows:
- Overall responses to questions before and after moving
 - An analysis of concerns prior to moving
 - An analysis of concerns post move and mitigating actions where dissatisfaction has been noted.
 - Information on how responses were scored by those who moved to council homes versus those who moved to homes in the independent sector.
 - Whole extracts from customer interviews so that people can understand the individual context in which responses were given. These are verbatim extracts which have been redacted to prevent individuals from being identified, and to remove reference to confidential and sensitive health data in order to maintain compliance with the Data Protection Act 1998 (Amendment 2003)

Headline Conclusions from questions asked before and after the move

3.16 Residents have successfully made the transition to new homes. This is evidenced by both this analysis which indicates relatively high levels of satisfaction and the fact that all placements have remained stable.

- Perceptions about residents' individual rooms are almost the same overall with 'quite nice' being the most popular response
- Perceptions about food and drink show that most people rated this as 'quite nice' The top score for food 'really great' is lower overall than previously.
- All residents felt very safe secure and comfortable at four weeks apart from one. (This resident found it quite difficult to adjust to their new home initially due to a long-standing health condition). The situation has since improved. One resident did not answer the question but there is no evidence to suggest any issues of concern with this resident.
- The most popular response regarding the care received from staff show that 'staff are quite good on the whole. Fewer people described staff as 'really great' following the move. However, as the residents are getting used to new staff, and have left homes where they have known staff for many years, this is not surprising. It is pleasing however that the lowest rating was 'quite good on the whole'.
- Perceptions of the level of individual choice are similar following the move. Levels of individual choice can fluctuate due to health and needs. (Some relatives, representing residents did not answer this as they felt they did not spend sufficient time in the home during visits to make a judgement.

How people felt about their moving plans

3.17 We took the opportunity to ask everyone prior to moving if everything they said they wanted in the moving plan had been put in place.

3.18 The ability to find accommodation that meets individual aspirations, whilst meeting individual assessed need can be subject to constraints for example the type of home required, and also vacancies available in the home of choice.

3.19 Out of 17 people who answered the question:

- 10 people said everything they wanted was in place
- 7 people said they had most things they wanted in place

Residents' concerns prior to moving

3.20 We asked people about any concerns they had prior to moving. This was to assess how people were feeling shortly before the move and the nature of their feelings.

Out of 19 people:

- 9 residents told us that they had no concerns at all
- 2 people said they felt sad about leaving but were looking forward to moving all the same
- 2 residents said that they did not really feel they could answer the question

until they had moved

- 2 residents said they had concerns about one or two practical things.
- 4 residents said they felt nervous about moving or did not want to move

How people felt they were settling in after four weeks

3.21 We asked residents how they felt they were settling in four weeks after moving.

- 9 residents described themselves as having settled in
- 9 said that they were settling in
- 2 said that they were not fully settled in

Residents who said they were not fully settled in at four weeks were monitored closely and recent updates show that they are much more settled currently.

Residents' concerns after moving

3.22 We asked people about any concerns they had having moved. This was to assess how people were feeling and to assess any negative impacts from moving that required mitigation.

3.23 Out of 20 people:

- 12 had no concerns at the four week review
- 8 told us about their concerns

How residents' concerns were addressed

3.24 One person did not like the location of their room because they had to use a lift to get to it. Following the review the person was moved to a ground floor room

3.25 One person found it annoying that the mirror in their room was too high. The mirror was moved shortly afterwards

3.26 One person wanted to put more pictures up as they found the room a bit bare. This was arranged shortly afterwards

3.27 One person mentioned a specific health matter which was not related to the move or accommodation and appropriate advice was given by the social worker

3.28 One person wanted their relative to get out and about more, and this was reported to the home manager for action. The resident has had a couple of trips out and arrangements have been put in place for weekly trips out.

3.29 One person said they wanted to get out and about more. This was referred to the home manager for action and arrangements have been made for trips out.

3.30 One relative mentioned about a staffing issue, this has been referred to the home manager.

3.31 One person's concern was that they weren't settling in well. Since the interview, indications are that the situation has improved.

How scores were allocated across the sector

3.32 The following table shows how scores were allocated by residents. Twelve residents chose placements in council homes and eight residents chose homes in the independent sector.

Distribution Of Scores Per Sector		
Response	Private	Council
What do you think about your room?		
Room is great	37.5%	16.5%
Room is quite nice	50%	83.5%
Room is ok	12.5%	0
I do not like my room	0	0
What do you think about the food and drink?		
Food is great	50%	16.5%
Food is quite nice	50%	58.5%
Food is ok	0	25%
Don't like the food	0	0
Do staff where you live now help you feel safe, secure and comfortable?		
Feel very safe, secure and comfortable	100%	83%
Not enough	0	8.5%
Not at all	0	0
Not answered	0	8.5%
What do you think about the care you get from staff?		
Staff are great	50%	41.5%
Staff are quite good on the whole	50%	50%
Staff are ok	0	
Don't like the staff	0	
Didn't answer	0	8.5%
Do you feel able to make day to day choices at home?		
All sorts of choices	62.5%	50%
Some choices	25%	33.5%
Limited choices		
No choices		
No able to answer	12.5%	16.5%
How are you settling in to your new home?		
Settled	62.5%	33.5%
Settling	37.5%	50%
Not yet fully settled		16.5%
Not at all settled		
Not answered		

Headline conclusions from the analysis

3.33 The table shows that the perceptions of residents who have moved are very similar, regardless of the provider.

3.34 It is pleasing to note this, particularly given the concerns some families raised during the consultation about independent sector provision.

Extracts from interviews at 4 weeks

- 3.35 To get a real flavour of how individuals have made the transition to new homes, it is important to look at the extracts which give an insight into life 4 weeks after the move and the overall positive feelings which are evident.
- 3.36 It is pleasing to note the value some residents and families placed on the support they received throughout the process which can be seen in the interview extracts.

Learning from the process of person centred re-provision

- 3.37 The approach designed for this re-provision was based on previously successful work undertaken by Leicester City Council staff to support people with severe learning disabilities to find new homes and leave NHS long stay hospital accommodation in the light of a national directive from the Department of Health. It is based on working closely with residents and their families to manage the process of change whilst at the same managing the workforce change that arises from decommissioning services.
- 3.38 A lessons learned exercise with those working on the EPH re-provision project will be undertaken next month, but it is worth sharing some of the success factors that are already apparent.

Success factors

- 3.39 A project team was set up to oversee the work on re-provision and agreed that a dedicated social team allocated exclusively to the project, should be put in place to support residents and families. Regularly present in the residential care homes, they formed effective relationships with residents and families, so that trust could be built with those affected by change. Residents and families could therefore talk to the same worker throughout the process, without the worry of talking to different officers, or feeling they were being passed around the system. The continuity of approach has proved extremely beneficial to residents and their families.
- 3.40 Managers and front line workers in the homes have long-standing relationships with residents and their families. Their positive attitude and practical support in supporting people to view homes, listening to residents and relatives and providing on-going emotional support was a key success factor. Staff maintained a professional approach in supporting residents, despite being affected by changes to their own employment and dealing with their own emotions at seeing residents move on to new accommodation.
- 3.41 Despite a long period of uncertainty about the future of the homes, staff remained professional and continued to deliver a good quality service through a difficult time. They were supported by their managers and were given the opportunity to raise their concerns in a supported environment. Support from AMICA was also made available. Senior managers and HR staff helped individuals to shape their own redeployment plans, to help them come to terms with the changes affecting them. Out of 57 staff affected 40 were redeployed, 7 took voluntary redundancy, 4 gained other roles independently, 3 left the authority and, 3 were made redundant.
- 3.42 The project team spent quite a lot of time planning the detailed approach to re-

provision so that there was a clear understanding of what was needed to achieve good practice. Workshops were held with members of the project team and front line staff to develop processes that would be helpful to customers and ensure a consistent approach. An example of this is the moving plan process and its associated communication materials and management tools. A very clear and simple process meant that residents and their families knew what to expect, and how staff would endeavour to match their new accommodation as closely as possible to things they said were important.

3.43 Quality assurance, independent of the project team was also put into place during the course of the project to check that residents and families were being appropriately supported. This was undertaken by a senior member of staff and included, observation of meetings with social workers and residents/families and sampling of assessments, support plans, and moving plans.

3.44 Six staff commendations have been received from the families involved, and no complaints have been made.

4. Details of Scrutiny

4.1 Anonymised information on resident progress on the seven stages of the My Moving plan process has been reported on a monthly basis to the Adult Social Care Scrutiny Commission.

5. Financial, legal and other implications

5.1 Financial Implications

There are no direct financial implications in relation to this report

Rod Pearson – Head of ASC Finance- Tel 374002

5.2 Legal implications

There are no direct legal implications in relation to this report

Kamal Adatia- City Barrister and Head of Standards Tel 371401

5.3 Climate Change and Carbon Reduction implications

There are not direct implications arising from the report.

5.4 Equalities Implications

Meeting the equalities needs of individuals who are moving, is a key requirement of the moving plan process and is mainstreamed throughout the seven stages of the process through a person centred planning approach.

Angela Hepplewhite- Business Transition Manager

Ext 2304

5.5 Other Implications

None

6. Background information and other papers:

N/A

7. Summary of appendices:

Appendix A – Individual Interview Extracts (anonymised)

8. Is this a private report?

(If so, please indicated the reasons and state why it is not in the public interest to be dealt with publicly)?

Yes

9. Is this a “key decision”?

Yes/No

10. If a key decision please explain reason

Appendix A- Individual Interview Extracts

Residents who have moved out of Elizabeth House and Nuffield House

Perceptions after 4 weeks

As part of the 'My Moving Plan process' a review of each resident is carried out about four weeks after moving. Part of the review covers perceptions about settling in. The following are anonymised extracts of conversations which social workers have had with individuals who have moved at their four week review.

The conversations took the form of a structured interview. They give a picture of the well-being of some residents who have moved. During the course of interviews, some statements were made about specific on-going health issues. These are not included. Statements have been anonymised so that individuals or their representatives cannot be identified in line with Data Protection.

A further review will be carried out six months after each resident has moved.

RESIDENT 1	Moved to a Council home
Resident comments	My room is nice and really warm. I keep it clean, the staff help me to do so, and that's why I like it. The food is alright but the last place was better because there was more choice and it tasted better. The staff keep me clean and I like them, they make me feel safe. When I need help, the staff do everything I need but this is very rare. I like to choose my meals, clothing and where I sit during the day and I particularly like to sit in the small lounge with my pet. I can go to the kitchen hatch and ask for food or snacks when I want to Everyone has been very helpful with my move. I am settling into my new home but prefer my last place.
Relative(s) comments	
The resident rated their new home as follows:	I really like my room it is great The food and drink is ok I feel very safe, secure and comfortable The staff are really great and meet all my needs I can make all sorts of choices I am settling in to my new home
Do you have any concerns/what happened to the concerns you have raised?	I have no concerns
Notes	
Action taken where any concerns were raised	

RESIDENT 2	Moved to a Council home
Resident comments	It's alright. The food is alright it's hunky-dory. I enjoy breakfast. I have Weetabix with hot milk and bread and jam. Of course, the staff help me to feel safe, secure and comfortable. They are alright the staff. I can tell staff what I want. I am settling in alright I think
Relative(s) comments	There a regular opportunities for X to make choices throughout the day.
The resident rated their new home as follows:	The resident rated their new home as follows: I think my room is quite nice The food and drink is quite nice I feel very safe, secure and comfortable The staff are quite good on the whole I can make some choices I am settling in to my new home
Do you have any concerns/what happened to the concerns you have raised?	I don't like the lift.
Notes	
Action taken where any concerns were raised	The provider stated that a downstairs room was being decorated for this resident. Following this interview, a check was made to see if x had moved to a downstairs room. This has happened and the resident reports being really happy now.

RESIDENT 3	Moved to a private home
Resident comments	I love my room as it has great views to the garden, so open and nice. I can see birds, squirrels and it is decorated to my taste. The room is also very light and spacious with en suite. The bed is very comfortable and I sleep better here and wake up late, whereas at my previous home, I used to wake up early, sometimes as early as 5.00 in the mornings. I see this as home. I like the food here and I eat well. I can have my tea in my room. I feel the staff make me feel very safe, secure and comfortable living here. The care is very good and all the staff are very nice and I have no complaints. They are all polite and helpful. I feel I am able to make my own choices.

Relative(s) comments	<p>We are very pleased with the room. It is a lot bigger than the room at the previous home. X can sit in their room and enjoy the privacy. My relative has told me, "I love it here. You've done me proud."</p> <p>All the things in the moving plan have been put in place.</p>
The resident rated their new home as follows:	<p>I really like my room it is great The food is great I feel very safe, secure and comfortable The staff are really great and meet all my needs I can make all sorts of choices I have settled in to my new home</p>
Do you have any concerns/what happened to the concerns you have raised?	<p>All my concerns were sorted out. Initially I was quite scared and worried about moving. But since moving here, I have no regrets, as I love living here.</p> <p>No current concerns raised.</p>
Notes	<p>The question about settling in has not been directly answered, but a positive response is implicit from the overall tone of the interview.</p>
Action taken where any concerns were raised	<p>No action required.</p>

RESIDENT 4	Moved to a private home
Resident comments	<p>Resident had a relative and a representative speaking on their behalf due to their needs.</p>
Representative's comments	<p>X is sleeping well at the home and seems to have settled in well. X has always enjoyed food and drink and will occasionally say that tea isn't nice but is eating well.</p> <p>X relies on staff a lot to feel safe and secure.</p> <p>The social worker noted that x seemed alert and well.</p> <p>X makes choices through non- verbal communication and is responding well to staff.</p> <p>X is involved in activities and is supported to sit with other residents and play games. Although not engaging in the games x likes to sit with other residents and be spoken to.</p> <p>X likes to wear flowers in her hairs, and sit at the window and read.</p> <p>X is able to have visitors and carers who take time to get to know her. It is difficult for x to recognise people due to the size of the home and different staff but this has not seemed to bother as much as family, previous care staff and the assessing worker thought it would.</p>

The resident rated their new home as follows:	<p>I think my room is quite nice The food and drink is quite nice I feel very safe and comfortable The staff are quite good on the whole I can make some choices I have settled in to my new home</p>
Do you have any concerns? What happened to the concerns you have raised?	<p>No, concerns were about the home closure. X is doing well at the new home.</p>
Notes	<p>The question about choice was not ticked, but comments indicate that the resident does exercise some choice.</p>
Action taken where any concerns were raised	

RESIDENT 5	Moved to a Council home
Resident comments	<p>I am happy enough with my room but I am going to change rooms soon because the carers say it can be a bit cramped with furniture and equipment. The carers seem to have no problem and I am quite happy with my room but a larger room would be better. I'm not worrying about it. The cook gets me tripe every couple of weeks and she specially got me some cheese and biscuits. The sandwiches are better here, the bread is better. I can't grumble. There is decent stuff at night and the cook is very obliging. I get soup, which I love and could eat all the time, pork dripping on toast and even a tin of John Smiths. You can't fault the cooks. I surely feel safe. I wear my lifeline, which is very good actually. The staff are good and know what I want and need. I ring the buzzer in the morning and the staff come about 15-20 minutes later. This gives me enough time to get ready and into the dining room for breakfast. Like anywhere, there is good and bad but most are good, brilliant. One lady (carer) does not seem to talk to me all the other carers do but one particular lady does not seem to talk to me. It's not a problem. I am still settling in so I am sometimes reluctant to ask for things or tell staff but the longer I am there the more used to them I will become. (This issue was reported to the home manager.)</p> <p>I can make day to day decisions. If I could, I would go home but I know this is no longer an option. I can choose my meals and what trips I want to go on. When I ask I get the things I want and need. I cannot fault the support we got from staff, helping me to move and the emotional support. The move had been much better than I thought but it was difficult emotionally. I have had some visits from staff where I used to</p>

	<p>live and the new manager is really lovely too. I am upset about my other home closing though.</p> <p>I am still getting used to things. I have only been here for five weeks. The weeks have soon gone. The staff have been very welcoming and all of my visitors have felt welcomed. Staff bought my relative a bouquet of flowers and a cream cake on the day of the review because it was a special birthday. The lounge can be very noisy, but I don't want to move to the upstairs one because that's too quiet.</p>
Relative(s) comments	<p>X could do with more space and I am happy to hear they are moving.</p> <p>You need to speak up this is the time to say if you are not happy with something.</p> <p>I wrote to the Leicester Mercury and MP, I was disgusted with the decision, but I am pleased with the support we have had since.</p>
The resident rated their new home as follows:	<p>My room is quite nice The food and drink is great I feel very safe, secure and comfortable The staff are quite good on the whole I can make all sorts of choices I am settling in to my new home</p>
Do you have any concerns/what happened to the concerns you have raised?	No
Notes	
Action taken where any concerns were raised	Issue of carer not speaking to X was reported to the home manager for follow up.

RESIDENT 6	Moved to a Council home
Resident comments	<p>My room is big enough but I would have liked a bigger room. The mirror above my sink is too high so I cannot see when I wash my face. I have told staff it is too high. I sleep well and it is always warm enough for me. The food is alright passable. I get enough to eat and when I do not want something that is on the menu and I can ask for something different and the cook will prepare it.</p> <p>The staff are good and I admire what they do. I do feel nervous when I am on my own but I wear a call bell and this</p>

	<p>makes me feel a little better. I only have to ask if I need anything from carers. The carers are all pretty much the same and I do not have any particular favourites. They come and chat to me when they have the opportunity. They are all good and I admire them for the help they give to people. I make daily choices. I ask for help when I want it. I always choose what I would like to eat and wear. If there are day trips, I am given the opportunity to go and I like going to the allotments or into town. I am not all the way settled yet I am on and off when it comes to that. Some days there are trips out so that is a good day and on others, there is not much going on so they are bad days. Sometimes I feel fed up but it's nothing to do with the staff but the weather might impact or I might not be well. I am still settling in.</p>
Relative(s) comments	<p>Staff bring bowls of fruit round as a snack and there is always crisps and chocolate available. I have had a dinner a couple of times and the vegetables are put in large bowls in the middle of the table so residents can help themselves (where possible).</p>
The resident rated their new home as follows:	<p>I think my room is quite nice The food and drink is quite nice I feel very safe secure and comfortable The staff are really great and meet all my needs I can make all sorts of choices I am not yet fully settled in to my new home</p>
Do you have any concerns/what happened to the concerns you have raised?	<p>None apart from my mirror being too high.</p> <p>It has helped a lot that some residents from the old home moved here too (relative).</p>
Notes	<p>Although the resident indicated that the food is "quite nice" the comments do not reflect this, as it is described as "all right, passable." For this reason, it has been reported as "OK" in the evaluation report.</p>
Action taken where any concerns were raised	<p>The project team has made a follow up check and can confirm that the mirror has been moved to the correct height for the resident.</p> <p>We have undertaken a follow up check to see if this resident is feeling more settled now. There is evidence that the resident is feeling happier now and has made some friends</p>

RESIDENT 7	Moved to a private home
Resident comments	<p>My room is suitable, the food and drink is quite nice, sometimes they give us big portions, I have told staff but they just say to each as much as I can but I don't like waste. The staff will help me sometimes to wash and dress, they keep</p>

	<p>an eye on me. I can get up whenever I choose too. The staff help me sometimes when getting ready in the morning. I got my en suite ground floor bedroom, as I wanted. I am also able to look at the birds and plants out of my window and will be able to sit outside in the summer or for a walk through my patio door that opens up in the grounds. I sometimes think I might be moved again. I do like it here but also liked it at x and was not expecting to move from there. I have settled into my new home I am looking forward to going to Skegness, I get on well with residents and staff but like to come in my room and read, I enjoy my own company too.</p>
Relative(s) comments	
The resident rated their new home as follows:	<p>My room is ok The food and drink is quite nice I feel very safe, secure and comfortable The staff are quite good on the whole I can make all sorts of choices I have settled in to my new home</p>
Do you have any concerns/what happened to the concerns you have raised?	No
Notes	
Action taken where any concerns were raised	

RESIDENT 8	Moved to a Council home
Resident comments	The food and drink is very nice. The staff are very, very nice.
Relative(s) comments	<p>Although X can't remember their bedroom, X has said to us that they really like it. We have no concerns about it as long as X is happy. X would like more cups of tea. They don't get as many drinks as they used to. We feel there are more staff around than when X first moved here. The staffing levels were low and seem to be lowered over weekends as well. We feel that staff seem a bit more 'visible' now. We see that X feels all right and that is the main thing. We are worried that X and friend aren't always sitting together any more, although we do feel that the situation is improving and they have been sitting together more, more recently. We have no concerns about the staff. They all seem friendly and OK. We don't feel able to answer the question about whether X can make choices, as we aren't around when choices are being offered. We have witnessed staff checking with X that they are OK. Most issues have been sorted out. When X first</p>

	<p>moved they were offered an upstairs bedroom, however, we thought this may not be the best place for X and they were moved to a downstairs room. We are happy if X is happy and we just hope that things continue to go well and that X remains settled.</p>
<p>The resident rated their new home as follows:</p>	<p>I really like my room, it is great The food and drink is quite nice I feel very safe, secure and comfortable The staff are really great and meet all my needs Can't answer the question about making own choices I have settled into my new home</p>
<p>Do you have any concerns/what happened to the concerns you have raised?</p>	<p>Most of my concerns were sorted out. I have no concerns now.</p>
<p>Notes</p>	
<p>Action taken where any concerns were raised</p>	<p>The issues of tea, staffing and sitting with a friend were discussed and addressed in the review meeting. Choices were also discussed and the home manager assured that the resident is offered choices throughout the day.</p>

<p>RESIDENT 9</p>	<p>Moved to a private home</p>
<p>Resident comments</p>	<p>Relative answered questions on resident's behalf</p>
<p>Relative(s) comments</p>	<p>The room has en suite facilities and plenty of space. There is a comfortable mattress and a TV in the bedroom and the resident can listen to music, which they like. The bedroom also has a nice view and is in a nice location. I have sampled the food and it is very nice. There is a good variety menu wise and always choices. Staff have a very good interaction with the resident – they sing, laugh and chat, give face-on contact and are very patient. Staff are also very friendly to me – they have created a nice atmosphere in the home and it is a pleasure to visit. This is also positive for the resident. There were a few little issues to start with but these have all been addressed. The resident always looks well presented and staff always seem to respond with kindness and patience. I cannot comment on personal care as I am not around then. Staff give the resident choices, but have to anticipate choices a lot going on knowledge of likes and dislikes/reactions. It is early days with the placement but it seems all right and resident appears relaxed. It will take time to fully settle. Resident had developed very strong relationships with staff at the previous home because resident had known them so long. It will take time to feel as settled with new staff.</p>

The resident rated their new home as follows:	<p>I really like my room, it is great The food and drink is great I feel very safe, secure and comfortable The staff are really great and meet all my needs I can make some choices I am settling in to my new home</p>
Do you have any concerns/what happened to the concerns you have raised?	<p>Current concerns: 1) Need opportunities to get out and about. It has been raised as an issue with home manager. 2) Health issue that is being dealt with. 3) Finance issue, advice given by social worker. All have been raised and discussed.</p>
Notes	
Action taken where any concerns were raised	

RESIDENT 10	Moved to a Council home
Resident comments	Relative answered on behalf of the resident
Relative(s) comments	<p>The room is a bit small, although X has everything they need in it at present, I am clearing the house up and X wanted to keep a cabinet that has been passed down from the family. I will juggle the furniture to see how to make it fit. X has never complained to me about the food and X seems to enjoy it and has enough. Plenty of crisps and fruit are available which X can snack on. I would know if X had not settled or did not like it. X seems to have settled without any problems and has adapted fine. I am not sure if staff are always here checking up on residents in the lounge, but there never seem to be any problems. All of X's needs are safely being met and staff seem fine. Another resident who moved from the home is always next to X and keeps an eye on things. There are some times recently when I have noted that X is tired during the day because they have been allowed to stay up late till about 1am. I do think that it's a bit late, but will keep an eye that it does not happen all the time, because I know X should be able to stay up if they wish. However, I don't want X getting into a routine of sleeping during the day all the time. I think X is fine and doing well and having fun because otherwise X would become quite withdrawn. X joins in the activities with others such as Bingo.</p>
The resident's relative rated their new home as follows:	<p>I think my room is quite nice The food and drink is great/quite nice I feel very safe, secure and comfortable The staff are really great and meet all my needs I can make all sorts of choices I have settled into my new home</p>
Do you have any concerns/what happened to the	I have no concerns.

concerns you have raised?	
Notes	The resident had ticked both “great” and “quite nice” on the question about food. The comments indicate that the perception is closer to “great” and it has been recorded as such in the evaluation report.
Action taken where any concerns were raised	

RESIDENT 11	Moved to a Council home
Resident comments	<p>[My room] is OK. The bed is good. I’m not sleeping too bad. There is nothing I don’t like about the room. [The food and drink] is OK. No problems with it. I think you get a choice. You get enough food and drinks. [The staff] are all right. I have to get up when I’m told. I’m my own boss.</p> <p>I have settled in to my new home. It’s not too bad.</p>
Relative(s) comments	<p>It is a smaller room. X can no longer keep their cabinet in the room. X doesn’t seem to be sleeping too badly. X didn’t settle for the first few days. I’m unsure [about the food] as not been around at meal times. It looks quite nice. X is eating and drinking well (better than at previous home) so this is a good sign. The staff seem very nice. I think they are supporting X well. I feel positive about the staff from what I have seen. I don’t feel I can fully reflect on it as not generally around when staff giving support. However from what I have seen and from observing other staff with residents they do seem to be very nice.</p> <p>I am not always around to witness choices. X is always asked what they would like to eat/drink. Staff always seem ready to please people.</p> <p>There were initial things that didn’t work out (can’t state them here) but generally in terms of choice of home and how X is settling in, things have worked out all right.</p> <p>We are very happy with how X has settled in and we have peace of mind about x’s wellbeing. We couldn’t have hoped for anything better.</p>
The resident rated their new home as follows:	<p>I think my room is quite nice The food and drink is quite nice I feel very safe, secure and comfortable The staff are quite good on the whole I can make some choices</p>

	I have settled in to my new home
Do you have any concerns/what happened to the concerns you have raised?	<p>Most of my concerns were sorted out.</p> <p>(Relative): This is rather a loaded question as I didn't particularly have any concerns. The move had essentially been OK for X. It was daunting sorting out the bedroom. But X has not been left on their own and is settling well. There have been no major concerns.</p> <p>There are a few minor concerns: 1) X's pictures still need putting up in bedroom. X is not bothered about them but it would make the room feel more homely. 2) Need to clarify money arrangements.</p>
Notes	Need to check that the pictures are now up.
Action taken where any concerns were raised	<p>Checked with home manager regarding choice/getting up in the mornings. They advised that X is given a choice of when they would like to get up.</p> <p>Checked re the current concerns: 1) Manager will get the handyman on the case re the pictures 2) Explained the money arrangements.</p>

RESIDENT 12	Moved to a Council home
Resident comments	Resident did not wish to take part in this interview despite encouragement from staff, and family member. The resident was very comfortable in the communal area and wished to stay there.
Relative(s) comments	<p>Relative reports x saying that bedroom is nice and bright.</p> <p>Relative said that bedroom it is lighter and slightly bigger. Staff have advised that they moved the furniture to exactly where x wants it. This helps x find their way around the room.</p> <p>X has told me that X does not feel they get as much choice over food as she used to get at X house. I am not sure whether this is true. X does always seem to have custard creams and tea beside which is good. Staff advised that X is eating well and is putting on a bit of weight. Staff stated that there is always choice on the menu but x has quite specific tastes.</p> <p>I feel that x should answer the question on how safe secure and comfortable they are feeling. I do know there was a spot of bother with a member of staff. X thinks the member of staff said that she was going to do something for X and never came back to her. X does not like this member of staff. I think a senior member of staff has looked into this.</p>

	<p>Staff I have met are generally nice but I would prefer X answers this question, as I am not here all the time. I have seen staff interacting ok with X when I have been visiting.</p> <p>I think x should answer the question on choices because I am not around enough to see</p> <p>This is the home that X wanted which means I can continue visiting regularly as it is within walking distance. We are both happy about this.</p> <p>I find the home quite cramped when I visit. It is less spacious than the last home. X does not like to use the visitors lounge when x visits. X seems to have adapted ok to the busier environment though.</p> <p>I feel that everyone has been very helpful. X is beginning to settle but the move has been difficult for X. Initially X looked quite drawn, but X seems a lot brighter in recent visits. I feel it is going to take time for X to feel fully settled.</p>
<p>The relative rated the new home as follows:</p>	<p>The room is quite nice The food and drink is quite nice I do not wish to answer the question on how safe x feels I do not wish to answer the question on how x feels about staff I do not wish to answer the question on choices X is settling into the new home</p>
<p>Do you have any concerns/what happened to the concerns you have raised?</p>	<p>I have no issues at this time –</p>
<p>Notes</p>	<p>The social worker popped into the lounge to ask x how they were doing. X said ‘ I’m alright I suppose’ Staff report that x has been saying that she is not settling. But say that although x states this, there are no specific issues. X is finding their way round the home and seems happy and health is stable.</p> <p>Although no concerns were raised, the issue about a “spot of bother” has been classed as a concern in the evaluation report.</p>
<p>Action taken where any concerns were</p>	<p>Regarding the comment made about a spot of bother with staff. A check was made with the home manager to</p>

raised	<p>determine whether there is an issue here.</p> <p>Another resident mentioned that he felt that a member of staff had spoken to x in a rude way and reported this to the senior on duty. It appears that the member of staff had asked x to wait a few minutes but neither x nor the member of staff felt there had been any rudeness.</p>
---------------	---

RESIDENT 13	Moved to a private home
Resident comments	My room is alright. It's comfortable. It's very nice. The food and drink is great. I have no problem with it. I like having a cup of tea. I feel safe and secure and I have no complaints or problems with the staff. They are very nice. They are always there for me and ready to help. If I have a problem, I can ask and they always help me. If I want to make choices, I can do. I have no complaints – if I did I would tell staff. I am enjoying having a cigarette with a friend in the home. The place is clean.
Relative(s) comments	X is very happy with their bedroom. I have never been here during meal times, but I have noticed X has put on weight since X moved here. I think this is a sign that X is enjoying their food. I think everything has gone quite well and I am not worried about anything. All the things we requested in the moving plan have happened, for X to move quickly, a smooth transition and minimal fuss. I am very happy with how things have gone and feel that X is settling in well and have no concerns
The resident rated their new home as follows:	<p>I think my room is quite nice</p> <p>The food and drink is great</p> <p>I feel very safe and comfortable</p> <p>The staff are really great and meet all my needs</p> <p>I can make all sorts of choices</p> <p>I am settling in to my new home</p>
Do you have any concerns/what happened to the concerns you have raised?	<p>All my concerns were sorted out. I have no concerns at the moment. If I have, I would raise them with staff. Otherwise I'm all right. People here make you feel comfortable.-</p> <p>Resident</p> <p>The environment is much busier and X found this hard initially but issues have been addressed. There was one resident who used to inadvertently upset X but X is more used to that person. I now feel that X has started to settle well now and is looking well.' – relative</p>
Notes	
Action taken where	

any concerns were raised	
---------------------------------	--

RESIDENT 14	Moved to a Council home
Resident comments	I did want a big bedroom with a double wardrobe so that all my clothes could fit in, as in my previous home. However, I understand that there were no bigger rooms available at the time, but I am happy with my bedroom, it is just because I was used to having a bigger room. There are alternative food choices here, if there is something that I am not keen on. No complaints. If I am happy or worried about something I do say so now; I did initially hold back a little but I don't care and will say how it is if something not quite right. The agency staff are not always good, there is room for improvement with them because they do not always know all my needs like the permanent staff do. I am quite verbal about choices and needs, although I do negotiate certain things because I understand that others here are more dependent on staff. For example, I know I must wait some times to get assistance for support in the morning. All of my needs are being met, there is nothing I am not happy with.
Relative(s) comments	
The resident rated their new home as follows:	I think my room is quite nice The food and drink is quite nice I feel very safe and comfortable The staff are quite good on the whole I can make all sorts of choices I have settled in to my new home
Do you have any concerns/what happened to the concerns you have raised?	No
Notes	.
Action taken where any concerns were raised	It is not clear why the resident is concerned about not having a double wardrobe as they have had one from the start. This is being looked at.

RESIDENT 15	Moved to a private home
Resident comments	Represented by a relative
Relative(s) comments	I feel that X's bedroom is really nice. It has everything they want -it is newly built is clean and pleasant and has en-suite facilities. I am very happy with it. It is a lovely room. I have

	<p>not visited at meal times but have asked X how dinner was and X said it was lovely. I have been chatting to other residents who were talking about just having had a lovely lunch. I think x gets offered drinks regularly. Staff are thinking about building a shop/bar. X likes a beer. X was asking for a beer last time I visited. Staff are going to look into this. I feel that X does feel safe and comfortable. X seems to get on well with the staff already. The atmosphere is positive and everyone staff wise seems to know what they're doing. X generally seems happy when I visit and there do not appear to be any issues with support from staff. However I cannot say for sure as I am not there all the time. [An appropriate] member of staff is now generally supporting X in the mornings and that seems to be working. Above all it feels like a home that is appropriate for X. We did not want X to move at all X does not feel that there has been any major issues. The new home has turned out to be a good home- it is well run and clean.</p>
The resident rated their new home as follows:	<p>The room is really great The food and drink is great I feel very safe, secure and comfortable The staff are quite good on the whole I cannot say how much choice x can make on a day to day basis</p>
Do you have any concerns/what happened to the concerns you have raised?	<p>There was a discussion regarding a specific health issue. Everything seems to be going ok and I feel that X is settling well into the new home.</p>
Notes	
Action taken where any concerns were raised	

RESIDENT 16	Moved into private home
Resident comments	<p>I like having my ensuite bathroom and toilet. I enjoy the meals provided here. I feel safe and happy. I like all the staff, they are very friendly, there are no concerns. They help me with everything, like getting washed and dressed. I have settled into my new home I do not miss my last home</p>
Relative(s) comments	
The resident rated their new home as follows:	<p>The room is quite nice The food and drink is quite nice I feel very safe, secure and comfortable</p>

	The staff are really great and meet all my needs. I can make all sorts of choices
Do you have any concerns/what happened to the concerns you have raised?	I have no concerns
Notes	
Action taken where any concerns were raised	

RESIDENT 17	Moved to a Council home
Resident comments	I like my room very much. It is a nice room. It is upstairs and I use the lift, sometimes on my own and sometimes with help. If I want help, there is always someone if I need them. The meals are fair, not marvellous but to the same standard as the last place. I always have enough to eat and there are drinks through the day and tea is always available. The staff are very good indeed. I have no particular favourites, but I see some more than others and I naturally prefer them. I don't get as much help as I used to because they encourage me to do as much as possible for myself, there is always someone with me, though. I rarely get to choose my own meals and there is less on offer. I choose my own clothes and am always asked if I would like to go out to the shops. The staff help me do this. I am still able to spend time with my friend who I see rather a lot of and the home has a nice lounge and conservatory I can sit in when I want to. I can have my hair done once a week which is rather nice and works well. I am settling in very well and am finding my way around. There are nice people.
Relative(s) comments	The room is fine. Two of the staff from the previous home visited last week which really meant a lot.
The resident rated their new home as follows:	I think my room is quite nice The food and drink is OK I feel very safe and comfortable The staff are great. I can make some choices I am settling in to my new home
Do you have any concerns/what happened to the concerns you have raised?	I have no concerns.
Notes	The question about staff has been ticked as quite nice but the resident describes them as very good indeed. So this has been reported as staff are really great.

Action taken where any concerns were raised	The lack of meal choice was queried by the social worker and it was confirmed that choice is offered, however, it is offered in a different way than the resident is used to. It has been suggested that the staff wait until the resident is sat at the table to ask them.
--	---

RESIDENT 18	Moved to a private home
Resident comments	I have a lovely view out of my bedroom window. I do not feel worried and I am quite settled here. It would be nicer if my relative could come and see me more often as this place is nearer than my own home. Staff are fine, one or two agency workers don't seem to like me but I don't care. There are no concerns it's just the way they look at me sometimes. I was worried initially about moving to a new home because I really liked my old home and was used to all the staff there and they knew everything about me.
Relative(s) comments	
The resident rated their new home as follows:	I think my room is quite nice The food and drink is quite nice I feel very safe, secure and comfortable The staff are quite good on the whole I can make all sorts of choices I have settled into my new home
Do you have any concerns/what happened to the concerns you have raised?	I have no concerns I have settled into my new home.
Notes	
Action taken where any concerns were raised	Resident's perceptions re agency workers discussed by home manager and social worker, and this is not an area of concern.

RESIDENT 19	Moved to a Council home
Resident comments	My room is nice but I wish it was a bit bigger. If it was slightly bigger, I would be able to have my recliner chair in my bedroom. I have a TV in my room. I watch Songs of Praise every Sunday in there. The food is rather good. I love Sunday dinner with roast beef, roast potatoes and Yorkshire puddings. I don't like the mash potatoes but never have. The staff are very good but feels they could do with more staff because it can sometimes feel short. I like to go out a lot and sometimes can't because there is not a staff member to take her. I could not go to church because there was not a staff member to take me. Staff make me feel safe and always call

	<p>the doctor or district nurse if I need one. Staff look after me, they are very good. I like one carer because she is like a mother, and she's my baby. Sometimes washing gets lost but when I tell someone, they sort it out for me. My room is kept nice and clean, and staff help me whenever I need something. I ask if I can help fold towels and serviettes and this keeps me busy and I feel I am helping staff and residents. I choose my dinner and If I don't want what's available I will ask for a salad. I visit my brother who lives in another home and choose to go to church when staff are available. I do have to wait sometimes if I want my puzzle or if I want to go out. I have never liked waiting. Some staff give me a cuddle. I have always liked a big hug.</p>
Relative(s) comments	
The resident rated their new home as follows:	<p>My room is quite nice The food and drink is quite nice I feel very safe, secure and comfortable The staff are quite good on the whole I can make all sorts of choices</p>
Do you have any concerns/what happened to the concerns you have raised?	<p>Yes (relating to specific ongoing health concerns). Also, I would like to go out to church more and I wanted a larger room for my recliner chair.</p>
Notes	
Action taken where any concerns were raised	<p>The resident was in a small room for a few days but is now in a larger room which can accommodate the chair. There is also a recliner chair in the lounge for this resident.</p> <p>Staff are currently looking at options for helping this resident go to church more often.</p>

RESIDENT 20	Moved to a Council home
Resident comments	<p>My room is clean and I have family photos up. It has recently been redecorated and has a nice view. I have no problems with the food and drink. The staff don't talk to me and there is a resident I don't like. The staff are quite nice. I don't know what I'm doing. I am offered choice regarding meals, clothes and activities. I don't feel that I have fully settled in to my new home and can't say whether I feel happy.</p>
Relative(s) comments	<p>X gets on well with some of the staff. There are no concerns about the staff and X is developing good relationships with them. X benefits from a regular routine and too much choice can confuse/upset X. Generally, everything has gone exactly as X planned/wanted. However, there are not a lot of opportunities for X to interact with other residents and it can get very quiet. X brightens up and appears much more them</p>

	self when one particular staff member is around
The resident rated their new home as follows:	<p>I think my room is quite nice</p> <p>The food and drink is quite nice</p> <p>I do not feel safe, secure and comfortable enough</p> <p>The staff are quite good on the whole</p> <p>I can make some choices</p>
Do you have any concerns/what happened to the concerns you have raised?	I am not settling very well.
Notes	This resident has a long-standing health condition, which can cause anxiety and confusion and has been closely monitored since moving.
Action taken where any concerns were raised	A recent report shows that the resident is becoming 'much more settled' The resident is interacting well with residents at meal times, and going to the shops with staff.

Project Details	
Project Number	566
Project Name	EPHs Phase One – Sale of Abbey House and Cooper House
Project Manager	Angela Hepplewhite
Project Director	Tracie Rees
Assistant Mayor Lead	Cllr Rita Patel
Department	ASC

Purpose of the Lesson Learned Report
To pass on any lessons learned that can be usefully applied to other projects. This document should be used to summaries the Lessons Learned captured in the Lessons Learned Log during the project.

Document Amendment Record			
Version	Date	Author	Amendment Details
1	16/2/15	Heather Kent	Initial version

1. Approach
<p>As part of good project governance it is essential to learn from what went well and what aspects we might change going in to the next phase of the project.</p> <p>Comments from officers involved in Phase 1 - the sale of Abbey House and Cooper House were gathered in a variety of ways, such as workshop, informal discussion, and 1-1 meetings.</p> <p>The project was delivered on time with positive feedback from relatives and residents. The information gathered will inform phase 2 sales of Arbor House and Thurncourt as going concerns.</p>

2. Things That Went Well
<p>Throughout the process, residents’ wellbeing was a priority for the Council and the new provider:</p> <ul style="list-style-type: none"> The successful sale of the homes as going concerns was the best possible outcome for the residents. The sale was in accordance with the general wishes of residents and relatives in the consultation exercises.

- Other positives for residents and relatives included:
 - Reduced anxieties, as residents were assured that they could stay in the homes.
 - All aspects relating to continuing levels of care for residents were maintained through the transition.
 - Collaborative working between the Council and the new provider to ensure appropriate staffing levels and clear information about transfer of out of hours management contacts.
 - Existing residents' fees have been honoured by the new provider, which has given residents and relatives assurance that they would not have to pay any more.
 - Residents were assured that they could keep their own rooms.
 - As an example of how residents have felt supported through the process, one of the home managers received thanks from relatives of a resident who had moved from another home. They stated that they were grateful for the love and care that had been paid to the resident at their previous home and at the current home.

The lessons exercises also looked at other aspects of the procurement and sale process:

- Several organisations expressed an interest in the homes during the procurement process and an experienced preferred bidder was identified.
- Completion was achieved within a challenging timescale. A target date of 2nd February 2015 was set once the preferred bidder was identified. Completion took place on this date.
- Comprehensive project management enabled this deadline to be achieved by providing continued focus, a clear governance structure and clear communication lines helping issues to be resolved quickly and effectively.
- There was a collaborative approach between the Council and the preferred bidder through the establishing of a Joint Sales Project Board and a structure of formal and informal groups to deal with specific aspects of the sales.
- The staffing implications of change were managed closely and effectively with good support from HR. The TUPE process was well managed and the interests of the workforce were protected. The unions were involved throughout.
- There were opportunities for staff to get to know the new owners in advance of the transfer and to visit other homes run by them. This helped reduce anxieties for staff and better prepare them for working with the new owners.
- Payment arrangements for LCC supported residents were in place in time. The payment run was on the same day as transfer, and success was achieved due to intense input from Finance and Care Management.
- Throughout the process, data protection advice was enacted, in order for safe transfer of the significant amount of residents' and staff personal information.

3. Things That Could Have Been Done Differently

- The use of an “asset purchase agreement” led to a substantial and lengthy due diligence process and a large amount of queries in the last few weeks of the project. To avoid this, an alternative approach is being put in place by Legal Services and Corporate Procurement for the sale of Arbor House and Thurn Court. This will mean that such information will be provided during the procurement process, rather than towards the end of the sale.
- We need to ensure that there is regular communication with residents, relatives and staff throughout the whole process. There were periods of time where it may have appeared to them that not much was happening. Regular communication during these periods would be useful in bridging the gap and letting people know that a number of necessary tasks were taking place in the background.
- Relatives of residents have advised that they would have liked more opportunities to meet with the preferred bidders prior to transfer. We will, therefore, look at arranging more scheduled contact opportunities for residents and relatives.
- Managers need to ensure that annual leave is taken appropriately and that training records are kept up to date.