

Update report Learning Disabilities Service

- Completed by: Simon Burt - General Manager 31st January 2022
- Approved by Finance Business Partner 31st January 2022
- Updated 7th March 2022 for GRIP SLT meeting and Audit and Scrutiny Committee
- Approved by: Chris Myers – Director for Health and Social Care

1. Purpose

The Audit and Scrutiny Committee at their meeting on 10th May 2021 have requested a further update report in relation to the recommendation within the “Final Internal Audit Report- Learning Disabilities Services Financial Management” dated 30th April 2021 and the impact of these actions on overall budget spend. An initial update was provided in September 2021. This report sets out the actions taken by the Learning Disability Service in response and impact.

2. Final Audit Report Recommendation

There was 1 recommendation contained within the above report as detailed below:

Table 1

Rec. Ref No	Recommendation	Responsibility and Timescale
5.1	<p>The LDS Manager should have greater clarity of what client volume and complexity of needs can be afforded within the available budget, including the delivery of savings. A project plan timeline and measures for delivery of savings should be developed and implemented.</p> <p>Assumptions behind the development of the budget should be agreed between LDS and Finance. This will assist with the provision of variance analysis as part of the budget monitoring process for this demand-led Service. This may require some financial management training.</p>	<p>LDS Manager</p> <p>July 2021</p>

3. Actions undertaken and in progress

The service has taken into consideration this recommendation and have undertaken a range of actions. These are set out in the table 1 below followed by an additional section detailing the response to the external Consultant's audit and the efficiencies projects within the financial plan.

Table 2

Recommendation	Management response	By whom	Completion date
The LDS Manager should have greater clarity of what client volume and complexity of needs can be afforded within the available budget, including the delivery of savings. A project plan timeline and measures for delivery of savings should be developed and implemented. Assumptions behind the development of the budget should be agreed between LDS and Finance. This will assist with the provision of variance analysis as part of the budget monitoring process for this demand-led Service. This may require some financial management training.	1. Monthly Financial Monitoring Client expenditure reports produced by finance. These reports include all expenditure month by month for each client. Also includes movement in costs month by month.	Finance	Complete and on-going
	2. Fortnightly Management Finance meetings held including all LD managers, Finance business partner and admin. Formal agenda and action tracker maintained. Covers monthly analysis by Group manager of client expenditure as in 1 above and the monitoring of all efficiencies projects within LDS financial plan.	General manager	Complete and on-going (moved to monthly)
	3. The fortnightly Resource Panel has now been moved to weekly. All new proposed care plans and reviewed Care Plans are submitted	General Manager	Complete and on-going
	4. Breakdown of budget to east West Team level and monthly reporting against budget requested. This will include a dash board highlighting when budget expenditure is within or out with budget.	Finance	To commence April 2022
	5. Training for budget managers in financial reporting and monitoring. This is included within scheduled finance meetings on-going. Specific training will be delivered by finance with the role out of the new financial reporting programme.	Finance	Partially complete
	6. External consultant analysis of assessments and care plans. A comprehensive action plan is in place reporting into FF2024.	Julie Heywood (External Consultant)	Complete and on-going

	7. Reports to CMT (X2) detailing efficiencies position, additional mitigations and extended timeline. Developed with finance business partner. 3 rd report delivered to SLT on 9 th Feb 22 detailing efficiencies update and budget forecast position 22/23. This includes forecasting cost pressures for 22/23. Efficiencies progress and planning detailed in this update report.	General Manager/ Finance	Complete
	8. Further budget position statement submitted to CMT Feb 22 as in action 7 above.	General Manager/ Finance	Complete Feb 22
	9. Benchmarking unit price and budget expenditure against other Councils. From the 2 Councils to date (1 within the SBC family of Councils). LDS spend per person with a LD is in line with these 2 Councils. Data from a 3 rd Council now also received and in process of being compared. Initial feedback from our Finance Business Partner is that 3 rd benchmarking Council is in line with the other 2 Councils. Unit price is lower than or equivalent to other Councils (comparison with national Scotland Excel contract price).	General Manager/Finance	Complete Feb 22
	10. Overall budget analysis completed establishing how the budget is spent, what measures have been taken to ensure proper governance and the efficient use of resources is delivered including other potential opportunities to develop further efficiencies. Budget analysis continues on a monthly basis as part of general governance.	General Manager	Complete
	11. Improved reporting of review activity. Monthly reporting detailing date of last review for all service users and ongoing.	Performance team SBC	Complete