

JOINT STRATEGIC PLANNING Health and Social Care

1. Introduction

- 1.1 We are required to establish a consistent model of planning to promote the health and well being of the population of Devon. This core responsibility is stated in documents such as the 'NHS Plan' and 'Local Strategic Partnerships - Government Guidance'. The recent publication by the Department of Health and Social care of *"Improvement, Expansion and Reform: The Next 3 Years Priorities and Planning Framework 2003 – 2006"* emphasises this further.
- 1.2 This paper describes a model of joint strategic planning and governance which integrates locality based planning within a countywide framework.

2. Background

- 2.1 Joint Investment Planning Groups (JIPs) were established under the Better Services for Vulnerable People initiative to co-ordinate joint planning in the main person-centred service areas. The main JIP areas covered were for Older People, Learning Disability and Mental Health.
- 2.2 The JIPs have operated at a locality (i.e. PCT/District Council) level. Their remit has been to:
 - a) Identify the existing needs of the population served by the JIP;
 - b) Develop joint plans, at a locality level, to meet identified needs taking account of available resources;
 - c) Contribute to the development of Countywide strategic plans;
 - d) Participate in the implementation and review of strategic plans at both Locality and County level.
- 2.3 It is no longer a Government requirement to continue to produce Joint Investment Plans. There is, however, a strong commitment within Health, Social Services and community partners to maintain and develop a network of Locality Planning Groups whose remit would be to promote strategic planning and implementation at the locality level.
- 2.4 New Department of Health guidance *"Improvement, Expansion and Reform: The Next Three Years Priority and Planning Framework 2003 – 2006"* places a shared responsibility on Health and Social Services to develop Local Development Plans (LDPs), covering a 3 year period, underpinned by a medium term financial strategy. These arrangements need to be inclusive of all main stakeholders.

- 2.5 The Department of Health Priorities and Planning Framework, which is specific to Health and Social Services, must be seen in the context of the Government's framework for *Community Planning* and *Local Strategic Partnerships*. This latter guidance is aimed at improving the delivery of public services and the quality of life of local people.
- 2.6 It is crucial that these planning frameworks are seen as being complementary and that they are developed together to maximise synergy and minimise duplication.

3. DEVELOPING A JOINT PLANNING MODEL FOR DEVON

- 3.1 The remainder of this paper outlines a model designed to create the coherence needed to promote the health and well-being of the population in each of the main service areas at both locality and County levels within Devon.
- The text for paragraphs 3 to 5 relates directly to the Joint Planning Network diagram in Figure 1.
 - See Appendix 1 for draft terms of reference for the different levels within the joint Strategic Planning Framework.

LOCAL PLANNING GROUPS – PCT / DISTRICT COUNCIL LEVEL Making the Transition from JIP's to Local Planning Groups

- 3.2 For each of the main service areas i.e. Older People and Disability Services, Children, Mental Health and Learning Disability it is proposed that there be a *Local Planning Group (LPG)*. Membership of LPG's should be inclusive of all main stakeholders in the statutory sector, voluntary and independent sectors, carers and service users.

[In this model the strategic planning framework for Older People and Disability is combined in a single structure. It may be better to work towards separate planning arrangement for Older People and People with Physical and Sensory Disability. It is proposed that the benefits of a combined or separate strategic planning structure for Older People and Disability be reviewed during the first year of operation of the revised planning system.]

- 3.3 There would need to be a clear link between the LPG and County-wide Strategic Planning Group in each service area. This should be a two way process, with locality needs analysis contributing to the formation of Countywide policies, priorities and high level strategies. Joint implementation programmes would be planned, delivered, monitored and reviewed at locality level, within the parameters of a county wide Strategic Programme.
- 3.4 The framework for strategic planning would be based on agreed principles. These would cover:
- local needs identification;

- decision making devolved to the most effective local level;
- consistency of policy, strategy and performance across all localities.

4. STRATEGIC PLANNING GROUPS – COUNTY-WIDE

4.1 The remit of the Strategic Planning Group would be to:

- Co-ordinate county wide strategic planning;
- Endorse the strategic programmes of the statutory agencies;
- Provide the policy and strategic framework for implementation at locality level;
- Monitor and review the effectiveness of the strategic programmes in meeting identified needs and priorities.

4.2 Strategic Planning Groups are co-ordinating bodies and do not exercise executive authority over their constituent members.

4.3 It is recommended that an Executive Management Group, comprising senior managers of the constituent statutory bodies be established as a sub-group of each Strategic Planning Group. Members of the Executive Management Group, while directly accountable to their employing authorities, would report to the Strategic Planning Group on the implementation of the Strategic Programme and its effectiveness and outcomes. (See Appendix 1 for Executive Management Group draft Terms of Reference.)

5. CO-ORDINATION AT LOCALITY AND COUNTY LEVELS

5.1 There needs to be a framework to co-ordinate a whole-system approach to Strategic Planning at both County and Locality level.

5.2 It is proposed that the Devon Strategic Partnership (DSP) be the body which co-ordinates, at County level, the work of Strategic Planning Groups, thereby ensuring a holistic overview of Devon's plans and programmes. Membership of the DSP should include representation from each Strategic Planning Group.

5.3 The effectiveness of strategic planning is dependent upon implementation at local level. It is essential that strategic programmes are built up from identification of need and priorities at local level. National priorities and targets must be complemented by the identification of programmes which reflect local need and priorities. These will be developed through Local Planning Groups with reference to and advised by Local Strategic Partnerships.

5.4 Local Strategic Partnerships are organised in different ways in different Districts. The structure of joint strategic planning for education, health and social services is sufficiently flexible to adapt to these differences, albeit there will need to be a period of trial and error before the right balance is found.

FIG 1. TOWARDS A JOINT PLANNING NETWORK FOR DEVON

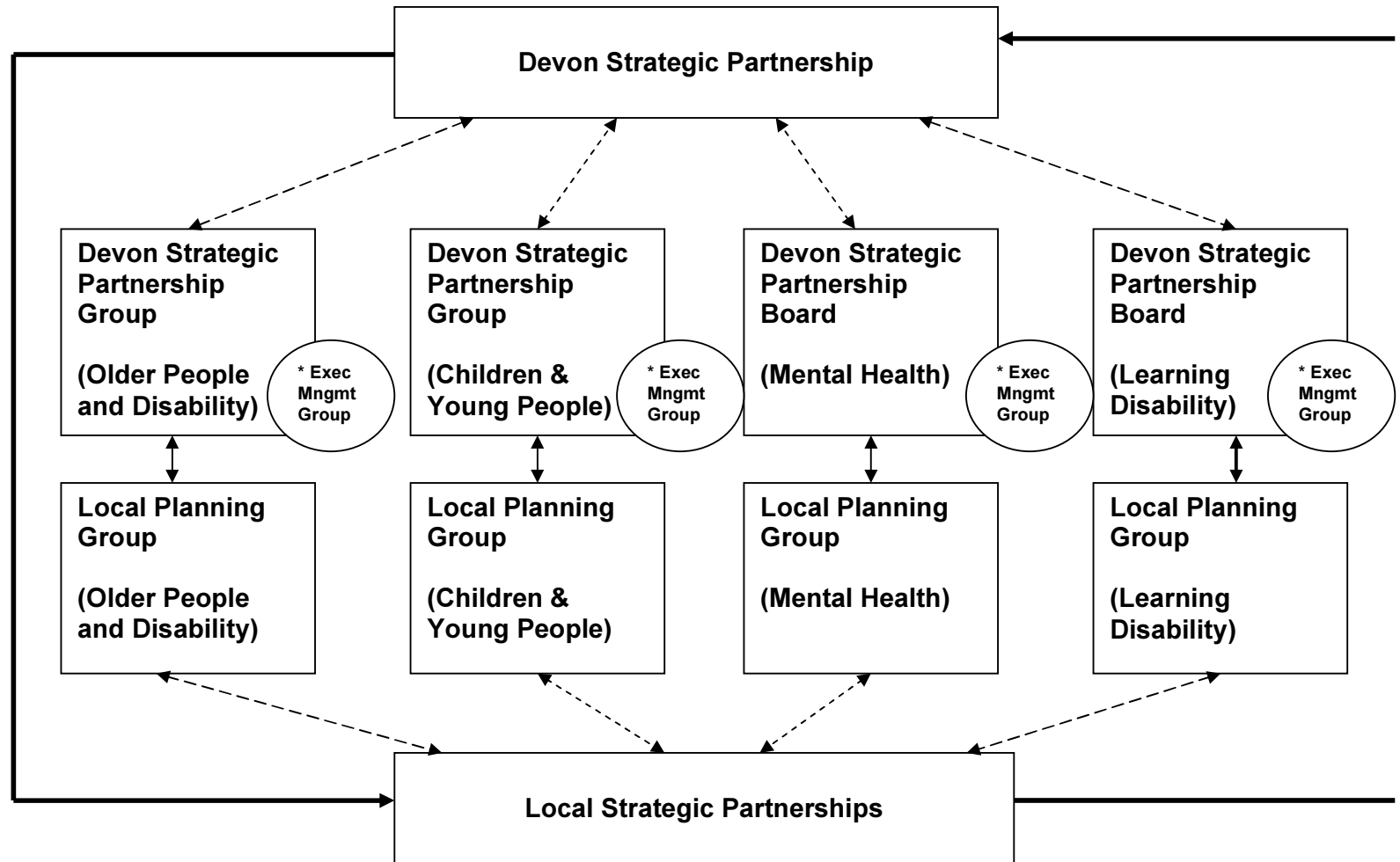
**PLANNING
LEVELS**

**STRATEGIC
CO-ORDINATION**
(See para. 5.2)

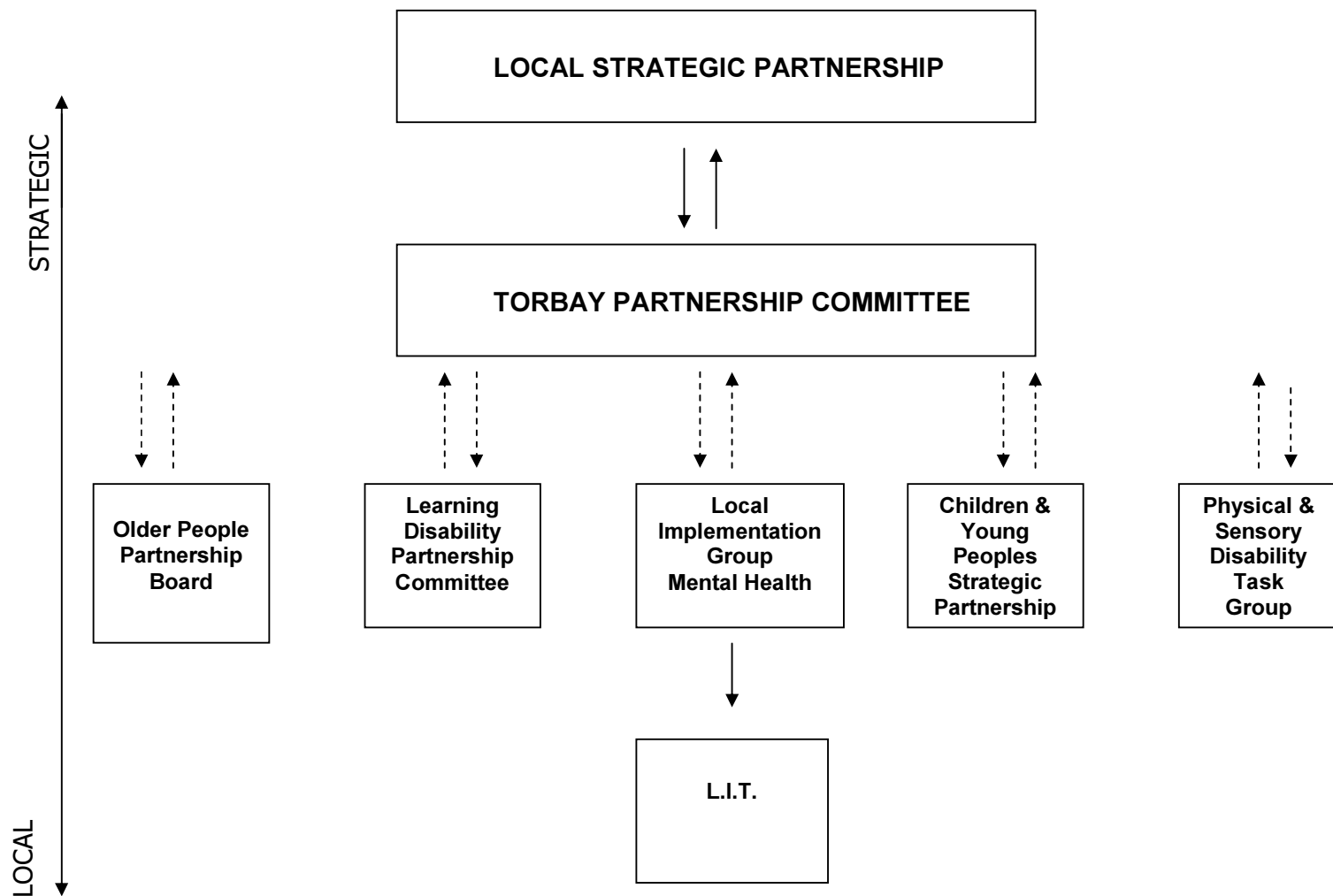
**STRATEGIC
PLANNING GROUPS**
(See para 4.1 to 4.3)

**LOCAL PLANNING
GROUPS**
(See para 3.1 to 3.4)

**LOCALITY
CO-ORDINATION**
(See para 5.3& 5.4)



* Exec. Group: To made up of senior managers who are representatives of and accountable to PCT Boards, Partnership Trust Board and Social Services Directorate



Arrangements for the Joint Strategic Planning of Mental Health Services in Torbay

1. As a Unitary Local Authority co-terminous with Torbay Primary Care Trust, Torbay has separate arrangements for strategic planning from those in place for the area covered by Devon County Council.
2. Mental health services are provided across Devon and Torbay by the Devon Partnership NHS Trust. In order to achieve continuity of planning and service provision across this health and social care community, arrangements to facilitate this process have been put in place at senior and executive levels.
3. The local planning group in Torbay is the Local Implementation Group (LIG) for the NSF for Mental Health. This group has representation from all stakeholders from the statutory, independent and voluntary sector and from service users and carers. This group undertakes local needs assessment and analysis and implements and monitors strategy and service delivery at local level. This work informs the Local Delivery Plan and the spending proposals for the Mental Health Grant.
4. The Torbay LIG is a sub-group of the Torbay Partnership Committee. This Committee co-ordinates local health and social care initiatives and is responsible for producing the Community Plan. This Committee links with the Torbay Local Strategic Partnership.
5. The Torbay LIG is also a subgroup of the Devon and Torbay Local Implementation Team. This Team co-ordinates strategic planning across the area and provides the mechanism for co-ordinating performance information and monitoring and reporting across the area..
6. The Devon and Torbay Local Implementation Team has an Executive Management Group which comprises senior managers of each statutory agency in the Devon and Torbay health and social care community. This Group is responsible for the implementation, review and evaluation of the policy and strategic programme.
7. Mental Health services for older people are managed and planned separately. In Torbay, a forum of local stakeholders has been established to co-ordinate and plan the implementation of the NSF for Older People and the NSF for Mental Health across this sector. This Forum links in to the South and West Devon NSF Planning Group, to the Torbay Local Implementation Group and to the Torbay Older People Partnership Board, which in turn links to the Local Strategic Partnership.

Arrangements for the Joint Strategic Planning of Learning Disability Services in Torbay.

1. A Unitary Local Authority co-terminus with Torbay Primary Care Trust, Torbay has separate arrangements for strategic planning from those in place for the area covered by Devon County Council.
2. Learning Disability services are provided across Devon and Torbay by the Devon Partnership NHS Trust. In order to achieve continuity of planning and service provision across this health and social care community, arrangements to facilitate this process have been put in place at senior and executive levels.
3. The Learning Disability Partnership Board in Torbay is the body responsible for Implementing "Valuing People". This group has representation from all stakeholders from the statutory, independent and voluntary sector and from service users and carers. This group undertakes local needs assessment and analysis and implements and monitors strategy and service delivery at local level. This work informs the Local Delivery Plan and the spending proposals for The Learning Disability development Fund Revenue and Capital.
4. Torbay Learning Disability Partnership Board is a sub group of the Torbay Partnership Committee. This Committee co-ordinates local health and social care initiatives and is responsible for producing the Community Plan. This Committee links with the Torbay Local Strategic Partnership.
5. The Executive Management Group comprises of senior managers of each statutory agency in the Devon and Torbay health and social care community. This Group is responsible for the implementation, review and evaluation of the policy and strategic program. The Learning Disability Partnership Manager and the Chair of the Torbay Learning Disability Partnership board attend this group to ensure cohesive and consistent planning across Devon and Torbay where there are shared resources and plans.
6. In addition there are quarterly management meetings between the Partnership manager and the Devon Partnership Trust Board member with a responsibility for Learning Disabilities.

JOINT STRATEGIC PLANNING

Draft Terms of Reference

1 Strategic Planning Groups

- 1.1 County-wide strategic planning groups have been established to co-ordinate policy and strategy in each of the main service areas, viz:
- Older People and Disabilities
 - Children and Young People
 - Mental Health
 - Learning Disability
- 1.2 Membership of strategic planning groups is inclusive of all main stakeholders in the statutory, voluntary and independent sectors, carers and service users.
- 1.3 The remit of the Strategic Planning Group is to:
- co-ordinate countywide strategic planning;
 - endorse the strategic programmes of the statutory agencies;
 - co-ordinate the implementation of policy and strategy at local level through Local Planning Groups;
 - monitor and review the effectiveness of the strategic programmes in meeting identified needs and priorities.
- 1.4 Strategic Planning Groups are co-ordinating bodies and do not exercise executive authority over their constituent members.

2 Executive Management Group

- 2.1 An Executive Management Group, comprising senior managers of the constituent statutory agencies will be established by each Strategic Planning Group.
- 2.2 The Executive Management Group will be responsible for implementation, review and evaluation of the policy and strategic programme, as endorsed by the Strategic Planning Group.
- 2.3 The Executive Management Group will report to the Strategic Planning Group, while remaining accountable to their employing agency.

3 Local Planning Groups

- 3.1 Local Planning Groups are established for each of the main service groups (see para 1.1). They operate at locality levels which may be based on either District Council, PCT or a combination, depending upon local circumstances and agreement.
- 3.2 Membership of Local Planning Groups should be inclusive of all main stakeholders.
- 3.3 Local Planning Groups will ensure a co-ordinated approach to implementation of joint policies and strategies.
- 3.4 Local Planning Groups contribute to policy development and strategic planning by:
 - undertaking local needs identification and analysis;
 - implementing policy and strategy at local level in accordance with locality needs, strengths and circumstances;
 - monitoring and reviewing effectiveness of policy and strategy at local level