

## **Case study:**

### **Ongoing PHBs to support long-term health and care needs, NHS Lancashire and South Cumbria ICB (Blackpool)**

Blackpool's PHB offer allows people to manage their own health and wellbeing outcomes which has a positive impact on both PHB holders and the NHS CHC team. PHBs are the default operating model for everyone in receipt of a homecare package, and through the process of regular reviews, staff identify what's working or not working with existing arrangements, and discuss with people the options to manage their care and support differently.

PHB holders are empowered, through the personalised care and support planning process, to be part of the decision-making process to meet their needs in more creative and flexible ways than those offered by traditional care arrangements.

The NHS team have worked in partnership with Blackpool Council since 2014 to successfully provide PHBs in NHS CHC. Blackpool Council's long-standing experience in delivering direct payments enabled the NHS to offer this option to people (along with notional and third party budgets) when the legal right to have a PHB in this area was introduced.

NHS CHC nurse advisors work closely with Blackpool Council's dedicated PHB officers to support people and families with their PHBs. The emphasis is on ensuring positive outcomes for people's health and wellbeing whilst managing the financial aspect to deliver value for money.

Nurse advisors and PHB officers share case management responsibilities. Nurse advisors provide clinical oversight on all aspects of care and support arrangements with PHB officers offering expert support in areas including recruitment, budget setting, mandatory personal assistant (PA) training, budget management and financial audit.

Both the nurse advisors and PHB officers undertake home visits as needed to help set up PHBs, and subsequently complete joint reviews aligned to the NHS CHC National Framework guidance or on request from people and families.

NHS Lancashire and South Cumbria ICB (Blackpool) and Blackpool Council have noted benefits for both people and the system since the introduction of PHBs, including:

- increased satisfaction of people in receipt of care and support from NHS CHC
- a reduction in case management input required from the NHS CHC team as people self-manage their own care and support
- reduced hospital admissions as a result of people receiving bespoke and tailored care that successfully meets their needs
- the employment of PAs via direct payments adding value to the local economy and creating exciting employment opportunities.

## **Key design features for implementation**

### **Step 1: Making contact and getting clear information**

- People are provided with clear information about PHBs once they become eligible for NHS CHC funding.
- In addition to information available in a local PHB information leaflet, the allocated nurse advisor discusses PHBs with people in more detail and provides support to help them choose the most suitable budget deployment option for them.
- PHB officers provide training to nurse advisors, ensuring quality and consistency in the information and support provided.

### **Step 2: Understanding the person's health and wellbeing needs**

- Conversations with people help to determine their health and wellbeing needs, what is important to them and the support they require to meet their identified needs.
- Any recently completed assessments (including the NHS CHC Decision Support Tool) can also be used to help identify specific needs.

### **Step 3: Working out the amount of money available**

- An indicative budget is set based on hours of care and support required and people are provided with an upfront allocation which includes contingency funds, costs associated with training for PAs (if required) and additional support for unpaid carers.
- The combined expertise of PHB officers and nurse advisors ensures that the indicative budget is sufficient to meet all the assessed needs.
- PHB officers provide further information on budget deployment options.

### **Step 4: Developing a personalised care and support plan**

- People are offered support from the PHB officer or nurse advisor to develop their personalised care and support plan.
- They are encouraged to document what is important to them, their goals and aspirations and how they are affected by their health condition.
- The type of support required to meet assessed needs and agreed outcomes and how this will be provided is clearly documented, along with contingency and risk management plans.

#### **Step 5: Organising care and support**

- The ICB's PHB Group in Blackpool have delegated authority for budget approval up to a certain value; PHBs that exceed this value are presented to the Senior Individual Patient Panel for consideration.
- The person is informed of the outcome of the decision and supported to respond to any queries regarding the personalised care and support plan or budget.
- Help to arrange the care and support agreed in the plan is provided by PHB officers and/or nurse advisors, including support to access training for delegated healthcare tasks.

#### **Step 6: Monitoring and review**

- PHB reviews (including review of people's needs) are undertaken alongside NHS CHC reviews, and also on request in the event of any changes required to the personalised care and support plan or budget. Three-monthly financial audits are undertaken for direct payments, with underspend recovered following a conversation and in agreement with the person.
- Both formal and informal feedback from people on their experience of receiving care and support through PHBs is used to continually improve the local process and offer.

To read the original document please visit [NHS England » Personal Health Budget \(PHB\) Quality Framework](#)