

## **Programme Board to consider Personal Assistant (PA) processes**

### **Terms of Reference**

#### **Background**

1. After an initial joint meeting on 13 May 2021 to address the issues associated with paying the £500 'thank you' payment to Personal Assistants, the Short Life Working Group met several times. During these meetings it offered solution focused support to allow us to overcome significant issues regarding the £500 thank you payment to Personal Assistants. It also agreed to establish a Programme Board for Personal Assistants to address wider issues which affect this group and enable it to be fully included as part of the social care workforce.

#### **Purpose**

2. The key function of the new Programme Board will be to enable Personal Assistants to be fully included as part of the social care workforce and ensure that necessary changes are fed into long term work-streams. The Board will do this by:

- Enabling the building of a sustainable infrastructure which develops a PA workforce which is valued, taking account of the independent review and future of adult social care: IRASC48: a fully recognised workforce, with full involvement of independent living movement.
- Working collaboratively to identify opportunities in relation to Personal Assistants, address challenges and co-produce solutions for the PA workforce;
- Supporting effective communication and engagement across the Personal Assistant networks and the wider workforce.
- Learning from the conclusions of the Matter of Focus outcome mapping workshops and other research papers and reviews and ensure that lessons are captured and fed into long term work-streams.
- Learn from the £500 payment pathway and ensure lessons are captured.
- Provide conclusions on how best to fully recognise the PAs as part of the social care workforce which before submitting to the Minister for Mental Wellbeing and Social to make the final decision about how to progress these recommendations.

#### **Principles**

3. The principles under which the PA Programme Board will operate are:

- Will this decision/recommendation in any way undermine the agency of the disabled person as the employer of their own personal assistants?
- Will this decision/recommendation further increase bureaucracy around the employment of PAs by disabled people?
- Is this decision/recommendation proportionate to the issue it is trying to address?
- Does this decision/recommendation have the support of the independent living movement in Scotland? If not, are we content to proceed in the knowledge that it will not have this support?

## Frequency of meetings

4. The group will meet as frequently as possible, sometimes once a month. The frequency of meetings will be determined on an on-going basis and agreed at the meeting.

## Membership

5. Membership of the new Personal Assistant Programme Board is proposed to bring together key stakeholders responsible for personal assistants.

6. To keep the numbers down we ask that only the named person attends unless they nominate a representative to take their place. Some groups such as the unions may choose to take it in turns to represent the sector.

<b>Organisation</b>	<b>Name</b>	<b>Background</b>
Scottish Government	Ian Turner	<p>Deputy Director Social Care Workforce and Fair Work Division.</p> <p>Overview of wider social care workforce policy environment and developments that will ensure greater parity in the treatment of Personal Assistants and rest of workforce.</p>
Self-Directed Support Scotland	Donald Macleod	<p>Chief Executive of Self Directed Support Scotland, the delivery partner for the Self-Directed Support Strategy. He has over 28 years of diverse experience in social care, primarily leading organisations working in learning disability, involved in Self-Directed Support since its inception.</p> <p>Within Autism Network Scotland, he led the implementation of the Scottish Strategy for Autism in partnership with Scottish Government, before establishing his own successful Autism consultancy.</p>
Scottish Government	Toria Fraser	<p>Leads the Scottish Government team looking after PAs. Previously she worked to embed self-directed support, on independent support and the Support in the Right Direction Programme. Before that she worked in school policy, and rural economic development.</p> <p>When her children were small, she worked in local government and also ran her own businesses in the Highlands.</p>

Scottish Government	Don Morrison	<p>Senior Social Care Policy Officer within the National Care Service, Engagement and Workforce Division.</p> <p>Provide Secretariat and wider support for the Programme Board.</p>
Scottish Government	Emily Russell	<p>Social Care Policy Officer within the National Care Service, Engagement and Workforce Division.</p> <p>Provide Secretariat and wider support for the Programme Board.</p>
Scottish Government	Susan Brodie	<p>Is Scottish Government lead sponsor for the Social Work Scotland project on Implementing and Testing the Framework of Standards at local level. Previously she worked on the extension of Free Personal Care to adults under the age of 65, also known as Frank's Law. Prior to working in Scottish Government, she spent 20 years working in the Scottish Court Service in various roles within the Court of Session.</p>
Lyn Pornaro, Centre for Inclusive Living (LCiL)	Lyn Pornaro	<p>CEO of Lothian Centre for Inclusive Living, an independent support organisation working across the three Lothians and the City of Edinburgh.</p> <p>I've worked in health and social care for 4 years, working with disabled people who have become, or wish to become, PA employers. I've experienced the positive outcomes of PAs being employed directly and also the challenges that are faced by both PAs and the employers.</p>
COSLA	Hannah Ross	<p>Policy Officer in the Health and Social Care team at COSLA (Convention of Scottish Local Authorities), the membership organisation representing Local Government.</p>
Personal Assistant Network Scotland, WEA	Les Watson	<p>I work for the Workers Educational Association and manage the Scottish Government funded Personal Assistant Network Scotland project, the project is designed to provide an independent support service to all PAs throughout Scotland.</p> <p>We are regularly in touch with PAs across the country and hope that our involvement with the new Programme Board can give PAs a voice that will be listened to and considered when making future recommendations that will most likely affect their work.</p>

Social Work Scotland	Ailsa McAllister	<p>The Project Manager for the SDS Project Team, funded by Scottish Government and hosted in Social Work Scotland.</p> <p>I have worked in a Local Authority as a Senior Officer for over 13 years. I understand the barriers that the workforce faces when attempting to make self-directed support a reality for people. Over the past 18 months, the SDS Team has developed standards to help reduce the inconsistencies observed around how SDS is offered and delivered. These standards draw on effective evidence-based practice. We believe that the PA workforce should be valued and treated the same way as other staff employed by local partnerships.</p>
Ayrshire Independent Living Network	Sharon McLeod	<p>I am the Learning and Engagement Coordinator for Ayrshire Independent Living Network or AILN for short. We are an SDS information and advice service covering pan Ayrshire.</p> <p>I have been working with PA employers and PA's since 2015 and our organisation has hosted PA events and created relevant PA resources, which has come from feedback from PA's. We also have a Volunteer PA mentor who is happy to speak with anyone who is considering applying for a PA post.</p>
Senior Lecturer in Social & Public Policy, Urban Studies/Institute of Health & Well Being, School of Social & Political Sciences, University of Glasgow	Dr. Charlotte Pearson	<p>Senior Lecturer in Social and Public Policy at the University of Glasgow. She has researched and published extensively on issues around personalisation in social care, both in Scotland and further afield. More recently, she has critiqued the role of social care in the pandemic and its impact on disabled people.</p>
Scottish Government	Jack Blaik	<p>Professional Adviser in the ILF Team Scottish Government since 2014, former member of the SDS Team in SG, former social worker specialising in SDS and ILF , former Manager of the Direct Payments ( DP) Team Edinburgh Council , PoA for family member accessing DP - and in consequence a current PA Employer on their behalf</p>

		Experience of seeing the PA Employer role from a number of contrasting perspectives -both professional and personal. And of having been a PA in a past working life. And awareness of some past SDS debates in SG about PA and Option 1 of SDS.
Personal Assistant Employer	Julia Smith	<p>I am a PA employer and a member of the people led policy panel. I have been an employer for almost 21 years, in that time I've seen many changes in both social work and ILF both good and not so good.</p> <p>I hope by working with the board I can help to make things on a more even plain for personal assistants. I feel that sometimes PAs are the forgotten paid carers of the industry. Lastly I look forward to learning new things that will help me be the best employer I can be.</p>
Personal Assistant	Donna Gordon	<p>I am 48 years old and have worked as a PA for nearly 27 years this September. I currently work full time for Julia Smith in her own home and have done for 20 years now. Previously to Julia I worked for 6 years as a PA with another lady who sadly passed away.</p> <p>I feel I could bring experience and honesty to the Programme Board. I was one of the first PA's to work with ILF in our Tayside/ Angus area 26 plus years ago. I have seen a lot of changes some better than others for PA's. The experience of working one to one and life in general as a day to day PA.</p>
Self-employed Personal Assistant	Donna Murray	<p>I am a Personal Assistant (8 years) in Highland Perthshire, contract 2 Personal Assistants to provide support to a family member (25 years) in Edinburgh and also work as a Self-Directed Support Officer for Social Work Scotland.</p> <p>An experience and passion for providing personalised care and support in rural areas. An understanding of being an individual commissioner and organiser of personalised support and an understanding of legislation, practice and challenges around Self-directed Support</p>

Inclusion Scotland	Pauline Nolan	<p>Head of leadership and civic participation at Inclusion Scotland, a leading national Disabled People's Organisation.</p> <p>I've been managing the People Led Policy Project since its inception in 2018. Previously I did policy work on social care support since joining the Inclusion Scotland Team in 2011, and in particular engagement on the Self Directed Support Bill and then the integration of health and social care support. I have also been a paid support worker in various settings prior to working for Inclusion Scotland.</p>
Glasgow Disability Alliance	Marianne Scobie	<p>Depute CEO at Glasgow Disability Alliance. We support disabled people to build their confidence, skills and connections across Greater Glasgow and we contribute to policy and co-design across Scotland. I manage our Community Learning &amp; Development, Digital Inclusion and Future Visions for Social Care projects and in have additional strategic remits for our work on Public Realm, Climate Change and Inclusive Communications.</p> <p>My work with GDA brings me into direct contact with people with lived experience of social care, including our Social Care Expert Group. I sit on a range of GCC, Scottish Govt and Social Security Scotland advisory groups, working groups and strategic groups. As well as a range of experience and knowledge related to my job, I am a disabled person and I've been employing my own PAs via and Access to Work grant for over 20 years.</p>
Scottish Social Services Council	Alison Upton	<p>Learning and Development Manager for Workforce Planning with the Scottish Social Services Council.</p> <p>I hope to contribute knowledge and experience related to social care workforce development, planning and career opportunities and learning from leading work with PA/PA employers and key stakeholders to improve understanding of the scope, value and support needs of the PA workforce.</p>
Scottish Social Services Council	Cheryl Glen	<p>Currently joint Acting Director of Development &amp; Innovation with a focus on Workforce Planning with the SSSC.</p>

		Hope to bring support to the group, the SSSC lead workforce development for the social services sector and we also provide National and Official Statistics on workforce data.
SDS Practice network	Margaret Petherbridge Lynda Wright	<p>Lynda Wright: Project Development Manager for SDS and Carers at Falkirk HSCP – job share with Margaret Petherbridge who chairs SDS Practice Network.</p> <p>Worked within Health and Social Care for over 12 years, primarily within respite/short breaks but also SDS and Carers and have experience of working within the voluntary and public sector organisations. Margaret has extensive SDS experience and can represent the views of SDS Leads throughout Scotland as she chairs Social Work Scotland SDS Practice Network.</p>
ILFS, Chief Executive	Peter Scott	<p>CEO of ILF Scotland.</p> <p>ILF Scotland is a Scottish Public Body which supports disabled people to live independently. We are a major funder of Personal Assistant employers across Scotland, and we hope to share the broad experience we gain from this with the Programme Board.</p>
SDSS (Take Control)	Joanne McGee	<p>I am the Co-ordinator at Take Control, East Dumbarton Direct Payment Support Service. We support clients through a safe recruitment process to employ Personal Assistants.</p> <p>We can assist the PA employer to:</p> <ul style="list-style-type: none"> <li>➤ Write a suitable job description</li> <li>➤ Advertise for Personal Assistants</li> <li>➤ Take up references and PVG checks for PA's.</li> <li>➤ Recruit personal assistants safely</li> <li>➤ Set up payroll</li> <li>➤ Set up PA employer insurance</li> <li>➤ Access information and training for pa's</li> <li>➤ Prepare pa contracts and calculate annual leave entitlement.</li> </ul>
Unison	Fiona Davidson	I'm an area organiser with UNISON. We have a number of members who are Personal Assistants who run into problems with their employers and they can be difficult to deal with.

		I would like a better understanding of how to manage these issues ensuring the personal assistant is able to assert their employment rights which they often find difficult because of a stronger sense of personal obligation to the employer than in other employment situations.
Unite	Linda Wilson	I am regional Officer with unite the unionist work form the Glasgow office.  I have been lead officer for the care sector in unite Scotland for 2 year representing all care sector employee and PAs.
GMB Scotland Trade Union	Megan Fisher	I am part of GMB Scotland Trade Union's Womens Campaign Unit.  I'll be representing our members who are Personal Assistants and will work closely to consult with our membership through each step of the process.
Dr Jim Elder-Woodward, OBE	Jim Elder-Woodward	Presently retired; Chair, Glasgow Centre for Inclusive Living; Chair, Scottish Independent Living Coalition; Vice Chair, Inclusion Scotland; established indirect payments throughout West of Scotland, before managing direct payments scheme in SW Glasgow; currently managing own SDS package of 5 personal assistants.
SDSS	Jeremy Adderley	Operations Manager for SDSS I resource and implement our projects which most recently include the PA Employer's Handbook and our input into delivery of the Scottish Government Thank You Payment ensuring the consultation and inclusion of our membership where possible. I've been with SDSS since February 2017.
Glasgow Centre for Inclusive Living (GCIL)	Angela Mullen	I works for Glasgow Centre for Inclusive Living/ Interim Chair of SDSS/ Convener Glasgow Disability Alliance.  I have been involved in the Independent living movement for many years. My roles have been varied roles however mainly supporting disabled people to have control over their support arrangements including recruitment and management of PAs.
Encompass	Sharon Onley	Encompass provide payroll and employer support for around 1000 PA's in the Scottish Borders.

		<p>My experience varies greatly however I deal daily with any payroll queries the PA's have and assist my colleagues with the day to day problem of matching PA's with employers.</p>
Healthcare Improvement Scotland (HIS)	Des McCart	<p>Senior Programme Manager with Healthcare Improvement Scotland (HIS). I have worked across the Self-directed Support and commissioning for social care agendas for the past ten years, having been a lead commissioner in a local authority before taking up a national role with the Joint Improvement team and then moving to HIS to follow on the same role.</p> <p>I am also Chair of Community Brokerage Network who have experience of working with people who have PAs (some self-employed and some not).</p>
Scottish Government	Karen Young	<p>Senior Research Officer, Social Care Analysis Unit. I have worked in SG Health &amp; Social Care Analysis for the past 4 years, providing evidence and analysis on a broad range of health and care policy areas.</p> <p>My current role focuses on evidence and analysis across all social care policy areas, and I work closely with other Government analysts, including statisticians and economists. I have a longstanding personal, professional and academic interest in disability policy.</p>
Independent living movement	Anne-Marie Monaghan	<p>Worked in social work for over 40 years and was instrumental in Self -directed support in Scotland. She ran the first test site in Glasgow and established the Community Brokerage Network in Ayrshire.</p> <p>Currently vice chair of ERIJB and a member of Glasgow IJB having been appointed by GGCNH where she is a non-executive director of the health board. She wears a variety of 'hats' but is committed to supporting people to work with PAs in a model that works for both the person being supported and the PA.</p>
Community Contacts, Carr Gomm	Becs Barker	<p>Operations Manager for Community Development at Carr Gomm. Part of that responsibility is overseeing our Support in The Right Direction Project, Community Contacts which offers a</p>

		<p>helping hand with SDS in Argyll &amp; Bute and Highland. I'm also responsible for involvement and participation with the people Carr Gomm supports. I am a trustee of Neighbourhood Networks, Go Deep Scotland and Argyll Children's befrienders and a newly appointed trustee of Self-directed Support Scotland.</p> <p>Throughout my working life, initially as a nurse, then in various roles promoting human rights-based approaches, I have been passionate about fairness, flexibility and equality. I've been supporting people and managing our SDS project since 2013 and this has put me in daily contact with personal assistant employers. I see this part of my job both as a support but also as a sleuth as I spend my days searching legislation and best practice to assist direct payment recipients to be effective employers. Equally, I am dogged in my determination to support fair work principles for Scotland's social care workforce, including personal assistants. My work has placed me in positions where I use my everyday experiences to challenge policy and to bring about change in the way we do things for the benefit of all concerned.</p>
SPAEN	Colin Millar	<p>CEO at Scottish Personal Assistant Employers Network (SPAEN). We support individuals who wish to move from passive recipients to active directors of their social care support and currently have around 500 PA employers from across Scotland.</p> <p>As part of ensuring our members and stakeholders remain “good and competent employers”, we encourage people to engage PA’s in good terms &amp; conditions and offer training and support to their employees.</p> <p>During my 11 years with SPAEN, I've worked closely with a number of key stakeholders including SSSC, the Poverty Alliance and PA Network Scotland to ensure the prospect of being a PA is rewarding, has good terms &amp; conditions and is an attractive role to the best calibre of candidate.</p> <p>We've worked to ensure that PA employers can access the Scottish Living Wage accreditation; that PA's have access to a workplace support</p>

		programme and a range of training and personal development.
Cornerstone	Laura Henry	She is the SDS Lead for Cornerstone SDS who are the advice and information service in Aberdeenshire. She also manages the SIRD project we operate and has worked in SDS for 6 years.

### **Secretariat**

7. Secretariat for the Programme Board will be provided by the Scottish Government team.

8. The notes from each meeting are not a verbatim account of discussions but rather simply record the key points discussed and will be drafted in a non-attributable manner. Bullet points and actions to be circulated after each meeting.

### **Proposed meeting protocol**

9. Meetings are expected to last no more than 2 hours

10. Members may suggest stakeholders and other interested parties to provide input, evidence or views where appropriate

11. Members should agree delivery timelines for key areas of work

12. The Programme board will feedback to their relevant organisations on a quarterly basis TBC.

13. Additional Scottish Government Policy representatives across relevant policy areas will be invited to join the Delivery Group on an ad-hoc basis, determined by themes due to be discussed.

14. The Programme Board will carry out wider consultation events as necessary to consult, inform, and gather greater understanding on particular issues.