

PA Programme Board

MINUTES: PA Programme Board meeting

Thursday 12th January 2023, 10:00-12:00

Present

| Attendees | Organisation |
|------------------------|---|
| Donald Macleod (Chair) | Self Directed Support Scotland (SDSS) |
| Toria Fraser | Scottish Government |
| Don Morrison | Scottish Government |
| Ian Turner | Scottish Government |
| Jeremy Adderley | Self Directed Support Scotland (SDSS) |
| Kayleigh Hirst | Self Directed Support Scotland (SDSS) |
| Donna Murray | Social Work Scotland |
| Anne-Marie Monaghan | Independent Living Movement |
| Jim Elder-Woodward | Independent Living Movement |
| Becs Barker | Community Contacts, Carr Gomm |
| Jenni Campbell | Scottish Government |
| Christina McLaren | Scottish Government |
| Blair Pinkett | Scottish Government |
| Anna Caceres | Scottish Government |
| Charlotte Pearson | University of Glasgow |
| Margaret Petherbridge | Chair of SDS Practice Network (SWS and Falkirk Council) |
| Les Watson | Personal Assistant Network Scotland (PANS), WEA |
| Gemma Wilson | SDS Cornerstone |
| Malcolm Triggs | SDS Cornerstone |
| Ashley Drennan | Inspiring Scotland |
| Sharon Shepherd | Personal Assistant (PA) |
| Alison Upton | Scottish Social Services Council (SSSC) |
| Julie Gracie | Scottish Social Services Council (SSSC) |
| Anita Prentice | Personal Assistant (PA) |
| Fran Holligan | COSLA |
| Hazel Jack | Encompass |
| Karen Albrow | PA Employer |
| Joanne McGee | Take Ctrl East Dunbartonshire |
| Marianne Scobie | Glasgow Disability Alliance |
| Sharon McLeod | Ayrshire Independent Living Network (AILN) |
| Julia Lawrence | Self Directed Support Scotland (SDSS) |
| Apologies | |
| Lyn Pornaro | Disability Equality Scotland |

| | |
|------------------|----------------------------------|
| Peter Scott | Independent Living Fund Scotland |
| Noleen McCormick | Social Work Scotland |
| Julia Smith | PA Employer |
| Yvonne Nova | Scottish Government |
| Jack Blaik | Scottish Government |
| James McNulty | Scottish Government |
| Tony Hadley | SDS Cornerstone |

Items and Actions

1. WELCOME AND INTRODUCTIONS

The meeting of PA Programme Board was held at 10:00 on Thursday 12th January 2023 via Microsoft Teams. The Chair welcomed the PAPB members, in particular Malcolm Triggs, who was here on behalf of Tony Hadley, and Anna Caceres, Scottish Government who has joined the meeting for the first time.

Apologies were received from Lyn Pornaro, Peter Scott of Independent Living Fund Scotland, Noleen McCormick of Social Work Scotland, Ray of PANS, Julia Smith and Yvonne Jack Blaik and James McNulty of Scottish Government and Tony Hadley of SDS Cornerstone.

2. APPROVAL OF MINUTES FROM 28 SEPTEMBER 2022

The minutes of the PA Programme Board of 28 September 2022 were approved.

National Care Service (Scotland) bill update

An update was provided on the National Care Service (NCS) (Scotland) bill. The bill still is in stage 1 with the minister now finished giving the evidence to all 8 committees. The Health and Sport committee will now collate the evidence from each committee and produce a report. The report will recommend, or not, whether the bill will pass to stage 2. The end date for stage one is scheduled for 23rd March.

If the bill passes to stage 2, from that point it is only MSPs who can put forward amendments. Therefore, if any board members or their organisations want an amendment then this can be done by contacting either your MSP or members on the Health and Sports committee.

Action

PAPB-AP112: SG to share with the PAPB the link to the Parliament website when the NCS final committee report for stage 1 is published

Review of action points from the last meeting

The action points from the last meeting were covered. The undernoted actions have been closed since the last meeting. Updates to outstanding actions were provided.

**Please note that Action Points have been renumbered. Old Action Reference numbers (e.g. PB45), where applicable, are provided brackets for cross-referencing with previous minutes*

PAPB-AP093 (PB45)– Links shared to PAPB members for the “Independent Review of Inspection, Scrutiny and Regulation” consultation and also how to get involved

PAPB-AP095 (PB47) – Cornerstone provided an update on how they set up their relief PA banks and will prepare a document to share their learning on this (see Action: **PAPB-AP116**)

PAPB-AP096 (PB48) – Updated ToR to be shared with Comms Subgroup and Christina McLaren to attend future Comms Subgroup meeting (21 February) and discuss changes to ToR

PAPB-AP097 (PB49) – The Recruitment subgroup Chair updated on the Make an ImPact radio and social media campaign launch in 3 areas in Jan 2023 to raise awareness of the PA role and drive recruitment. The learning from the campaign will be shared at the next PAPB meeting (see Action: **PAPB-AP119**)

PAPB-AP099 (PB51) – Donald met with the SG team leading on the national marketing campaign and discussions are ongoing. The SG team will be attending a future Recruitment Subgroup meetings

PAPB-AP101 (PB53) – Donald updated that a draft report has been prepared and due to be published soon. There are recommendations on fair access to SDS, quality and capacity building, information and resource and meeting needs. While there are not specific recommendations for PAs this report forms the first stage in a process, with the next stage being the development of a working group

Updates on open action points

PAPB-AP094 (PB46) – (update outstanding)

PAPB-AP098 (PB50) – Donald to speak to each of the subgroup Chairs in January 2023 about widening diversity and the scope for members of current working groups on specialisms, such as autism and homelessness who may also wish to join Subgroups

PAPB-AP100 (PB52) – This will take place at a later date, possibly in March 2023

3. UPDATES ON THE WORK OF THE SUBGROUPS

3.1 Training subgroup

SG40 – The proposal submitted for grant funding for the national PA training framework has been agreed. The first priority is to begin recruitment for 2 posts, ideally people with lived experiences of disability and/or working with PAs. The aim is to:

1. develop a consistent nationwide training framework for PA employers and PAs
2. contribution to the development of a career pathway to allow movement into new roles, for example, PAs who may wish to move to a different health or social care setting or those working in other health or social care settings who may wish to pursue a PA role and to identify what skills are transferable and where further training will be required

The Training Subgroup Chair thanked SG colleagues for supporting this work by providing the funding resources needed.

Actions

PAPB-AP113: Develop detailed job descriptions for the recruitment of 2 new posts to work on the Training Framework

PAPB-AP114: Training Framework to begin with a scoping exercise of what training is currently being delivered by different organisations across the country in order to identify best practice. This will lead to the development of a training programme.

PAPB-AP115: PAPB members to contact the Training Subgroup Chair if they would like to see the final PA Training Framework proposal submitted to the SG

3.2 PA Network subgroup

The PA Network subgroup has now been formalised and a ToR has been established.

The group is now looking for a PA to volunteer to Chair the group.

Cornerstone provided an update on PA support offered by their service:

- **One-to-one advice for PAs:** This support service continues to see a steady uptake from PAs. Enquiries are typically around contracts, insurance, training and access on different courses. These are usually dealt with locally Cornerstone have good contact with providers

- **Peer support for PAs:** There are a couple of face-to-face groups in place and PAs are offered opportunity to come along to these. Uptake to this has been slower but this could be because all PAs in Aberdeenshire are yet to be reached, and this is partly due to the size of the rural area and being able to get people together in one place. A Facebook for PAs was set up just before Christmas 2022 and this runs through existing cornerstone page – the Facebook page is branded as a social space for PAs to come along and share views and to make contact with one another. Additionally, this also gives Cornerstone a direct line of communication with PAs to share relevant national and local information (the route to communication with PAs otherwise tends to mainly go via employers).

Alternative peer support model needed?

Initial findings suggest there could be less ‘buy in’ for traditional peer support arrangements whereby PAs are invited to come together in a group setting. This approach may be interpreted as being more relevant when a PA has a problem. Instead, there is perhaps more of an appetite for direct support for PAs (with networks that grow more organically rather than being imposed). Therefore, do we reframe the idea of peer support? Experience at Cornerstone suggests PAs prefer the informal social side, such as going for a coffee and chatting with others who appreciate the uniqueness of the role.

Relief PA Banks

Cornerstone have set up a PA relief bank and they presented on the background to this and how it works for PA employers and PAs looking for relief work.

The background to setting up a PA relief bank stems from the acute challenge in social care recruitment and the knowledge that many of their PA employers only have 1 or 2 PAs, and therefore, finding sickness and holiday cover can present a challenge.

The relief pool as a service is designed to help support this. As a temporary measure, relief posts have been advertised on the vacancies page on Cornerstone’s website. However, it is felt that this is not right place to be advertising relief vacancies because PAs coming onto this space are more likely to be looking for permanent posts.

A steering group was set up to consider the infrastructure needed for the development of a relief pool. They started by gathering feedback from clients that was overwhelmingly positive and showed there was a demand

for the service. PAs also indicated that they would be willing to put their names forward to be contacted on a relief basis. It was important that a relief pool would be a safe place for PA employers to advertise, that the correct recruitment procedures for taking on PAs would still be followed and that it would not become a tool used to poach PAs from other employers.

A question was asked on what levels of resources are needed by anyone who wishes to set up a relief bank.

- Cornerstone have not required additional financial support to set up the service because they used templates (similar to a staff page) within their existing website to set up the relief pool service area. The SDS Advisors at Cornerstone act as the gatekeepers for the relief pool to ensure its safety

Steps in setting up a relief bank

1. PAs can only sign up to the relief pool if they are working for a current Cornerstone client
2. The relief bank relied upon employers putting forward their existing PAs to join the relief pool
3. There was an internal process to add PAs to be added to the relief bank – PAs complete an application profile online that includes their name, contact details and short profile about themselves
4. Cornerstone then vet applications to check PAs are currently employed by a Cornerstone SDS client
5. Once PAs are added to the relief pool, only current Cornerstone clients who are SDS employers can browse the PA relief bank. This is done by logging in securely to the PA relief bank section on the Cornerstone website
6. When an employer finds a relief bank PA who matches their location, availability, gender etc. they then contact their SDS advisor to organise an interview (N.B. employers do not directly liaise with the PAs advertised in the relief pool to ensure fair competition)
7. The SDS advisor liaises between the PA employer and PA, and provides the PA with details of the relief work (e.g. dates, location) and sets up an interview
8. If the interview is successful and the PA accepts the offer, thereafter, this will follow the recruitment process as normal
9. Contracts for relief bank PAs are set up on zero hours basis with the employer so that the employer can call upon the same PA again for any future relief work and they are already set up to do this without having to go through the recruitment process again

Some questions followed the presentation:

The number of PAs signed up to the relief pool was asked and this is currently around 40.

A concern was raised around the current recruitment crisis and managing clients' expectations that cannot be delivered given difficulties exist in filling permanent posts. Cornerstone emphasised the importance of being very clear in their communications that their priority is to drive and develop their recruitment strategy for permanent posts and the PA relief pool is something that they are developing in addition to this.

A concern was raised around how to ensure PAs employed on a relief basis can be given the necessary training by the PA employer on their individual specific needs. It was recognised that although relief PAs are already employed by at least one other PA employer, the training that they have for that role might not match the requirements of another PA employer. In this situation, it is expected that the relief PA would be required to go through the necessary training and a procedure needs to be in place for doing this. Donald said that this something that can be pick up by the Recruitment Subgroup.

Actions

PAPB-AP116: Malcolm Triggs to share a document on how to set up a PA relief bank with the PAPB and this could potentially be shared with other partners

PAPB-AP117: SDSS to add details of the PA relief banks to the PA/E Handbook and Find Help guidance for Aberdeenshire

PAPB-AP118: Recruitment Subgroup to explore setting up PA relief pools, and consider sensitivity, boundary and training issues, such as how to ensure procedures are in place to ensure PAs employed on a relief basis can be given the necessary training by the PA employer on their individual specific needs

3.3 PA Recruitment subgroup

Kayleigh Hirst is the new Chair of this subgroup.

The most recent meeting of the PA Recruitment subgroup focused on updating the myjobscotland page that has been set up for PA recruitment.

The Recruitment subgroup Chair reported that the SDSS *Make an ImPAct* media campaign video stories will be used to support a radio and social media recruitment campaign for 2 weeks in January in 3 test areas:

Aberdeenshire, Ayrshire and Lothians (Edinburgh). The aim of the campaign is to:

- raise awareness of the PA role and an understanding of what the role involves within the public
- prompt people within the 3 test areas to look at the advertised vacancies and apply
- test the effectiveness of the different methods (radio/social media) and if the messaging is right

The test campaign has been supported by Cornerstone, LCIL and AILN within the 3 test areas, and these organisations will also share the campaign across their networks.

In order to evaluate the impact of the campaign, a survey will be sent to any applicants throughout the period of the campaign and for a few weeks thereafter, to measure if they had previous awareness of the role of a PA, whether the campaign had an influence on them making an application, as well as information about who is applying for PA roles (e.g. do they have a background as a PA/ in social care, where are they finding out about PA roles).

Actions

PAPB-AP119: Recruitment subgroup Chair to share feedback and the learning from the Make an ImPAct radio and social media recruitment campaign being tested in 3 areas across Scotland, in particular if the recruitment campaign has increased applications to vacancies

3.4 PA Communication and Information subgroup

The PA and PA Employer handbook is now had 2900+ users.

The Make an ImPAct campaign has now moved from sitting within the Communication and Information subgroup to the Recruitment subgroup given the critical nature of recruitment at the moment.

SDSS and the Scottish Government are working together to hand the database of PA contacts who received the £500 payment to SDSS, ensuring that the right data protection procedures are being followed.

3.5 PA Wellbeing subgroup

The Wellbeing subgroup have met twice and are examining survey findings related to wellbeing support and considering the national wellbeing hub's relevance to PAs.

3.6. PA Direct Payment subgroup

The Direct Payment subgroup have met twice and have agreed their ToR. The Direct Payment subgroup are in the process of preparing the questions in order to survey differentials in payment rates locally. The subgroup plan to meet with COSLA regarding their feedback on the questions in the draft survey. The plan is to launch the survey by the end of January with the analysis to be undertaken in March. The findings will be used to identify common core components on the national agreement.

The subgroup Chair will also identify social work practitioners to provide training to them and explore links with SiRD organisations. Conversations should also be taking place with DPOs and CILs.

The subgroup Chair is also meeting with Fair Work governance colleagues in relation to pay, effective voice, sectoral bargaining and terms and conditions.

Actions

PAPB-AP120: Direct Payment subgroup to meet with COSLA regarding their feedback on the differentials in payment rates locally draft survey questions

PAPB-AP121: Planned launch of the survey on differentials in payment rates locally ready at the end of January 2023 with analysis to be undertaken in March 2023

PAPB-AP122: Direct Payments subgroup to explore links with SiRD organisations as well as DPOs and CILs in relations to training of social work practitioners

3.7. PA Data subgroup

The group's role is to explore qualitative research and quantitative data.

The Data subgroup will hold their first meeting on 19th January. SDSS will explore the progression of their Annual PA Workforce Survey at this first meeting (see agenda item 4).

The subgroup will also be involved in work establish the size of the workforce and demand in order to support workforce planning, support and training. The group will also be exploring PAs employed through alternative sources, such as Access to Work or self-funding.

Toria will meet with colleagues leading on social care data improvement.

Glasgow University have made a successful application to the Scottish Graduate Social Science School for a fully funded PhD looking at Personal Assistance. Recruitment of a suitable PhD candidate will begin mid-March with a starting date of October 2023.

4. PA PROGRAMME BOARD SECRETARIAT

4.1 Workplan

SDSS are in the process of updating the workplan for the PAPB which is available on the SDSS website.

4.2 Annual PA Workforce Survey

The second annual PA Workforce survey is due to run during the month of April 2023. SDSS will lead on its delivery. SDSS shared the questions that were used in last year's survey for feedback on whether there is a justification for amendment to any of these questions and/or to propose any additional questions.

Julia presented on some of the findings from last year's survey. A link to the Forum page on SDSS with the questions from last year was shared and board members can comment directly in the Forum. In addition, a Word document with the questions from last year's survey will be shared with the group and any comments following the meeting can be sent by email to Julia.

The following suggestions were made to consider for addition to the survey:

- Inclusion of specific wellbeing questions
- PAs awareness of any of the recruitment campaigns, work of the PA board and anything new since the previous survey (e.g. PANS membership)

4.3 PA Newsletter

PA newsletter would normally be sent out ahead of a PAPB but in this next newsletter we are wanting to include PAs voice in producing the newsletter. Could all board members ask any PAs who would like to be involved in producing the newsletter to get in touch with the PAPB Chair

ACTIONS

PAPB-AP123: Julia will share a Word version of the Annual PA Workforce Survey questions from 2022 with the PAPB for comments on where gaps may lie

PAPB-AP124: Julia to attend the next meeting of the Wellbeing subgroup to discuss the addition of questions related to wellbeing to the Annual PA Workforce Survey 2023

PAPB-AP125: ALL to pass on Donald's contact details to any PAs that would like to be involved in producing the PA newsletter

5. SDS Improvement Plan

SDSS are working with a Steering Group including SG, COSLA, Social Work Scotland and others on the next draft of the SDS Improvement Plan. Once this has been agreed by the Steering Group, this will be shared with the PAPB for comment. The PAPB members were urged to provide feedback on the plan and to also share the document widely within their networks in order to capture everybody's thoughts and ideas.

Actions

PAPB-AP126: Donald to share the draft SDS Improvement Plan for comment by PAPB members. PAPB members are also urged to share within their networks

6. PANS update

PANS will become a membership organisation from 1st April 2023 and they are currently working on having a basic membership offer available by then, and this be changed/improved in time. There are several considerations at present:

1. What will the membership offer be to entice PAs to join the network
2. What will the service level be for PAs who choose not to join the network
3. Is membership for PAs only or can e.g. PA employers, social service staff etc. join as members (possibly associate members?)
4. Can people thinking about becoming a PA join?
5. The aim is to make joining the network easy, however, still need to establish how to verify that those applying are PAs
6. How do we reach those PAs with accessibility needs, particularly those lacking digital skills or with poor digital connection
7. Who will have access to the members database?

Membership levels?

- Should we have basic level membership?

- Starting point being free and then tiered
- If tiered then what benefits do we offer to justify fee?

Membership Incentives?

- PA ID Badge
- Discussions with 2 leading insurance companies to negotiate potential discount on insurance products for PAs and PA Employers
- Blue Light card – they are currently considering allowing PAs to access card – PANS negotiating if the PANS ID Badge can be used as proof of working in social care
- Discussions with retail and leisure to negotiate member discounts – feedback is they would like an idea of numbers before committing

Next steps for the future will be to create a PA Network Board that will be mostly made up of members and facilitated by PANS to help inform what PAs want and need. Then in the long term the PA Network Board would also feed into the PAPB, reporting on a quarterly basis.

The board commended PANS on their membership work, providing PAs with formal recognition, and support.

SDSS will also be supporting PANS on comms around raising awareness among new and existing PAs of the PANS membership. It was proposed that formalising the signup process for PANS membership may be the next stage.

A question was asked about union membership for PAs. PANS do signpost PAs to unions, however, one of the barriers to joining can be the fees. Furthermore, some unions are unaware of the exact role of the PA and therefore the support they can offer may be limited. PANS can also offer support to PAs but they don't have the same financial resources as unions when it comes to any legal issues. It was proposed that union membership could also be considered as being part of a PANS membership offer to PAs.

It was proposed the addition of information about PANS could be added to PA job adverts could help raise awareness of the support network available to them at the recruitment stage.

Actions

PAPB-AP127: Explore rolling union membership fees as part of the PANS membership package

7. IRISR UPDATE

The Chair sits on advisory panel of the Independent Review of Inspections Scrutiny and Regulations (IRISR). PA registration and regulation which was tackled by the PAPB early in the consultation phase is a regular point of discussion. When the panel report it will be up to the Scottish Government to accept those recommendations, or not.

Included in the circulated papers ahead of this meeting is the Scottish Government and PAPB group stance on disclosure and PVGs registration and at present there is no intention for the government to regulate PAs at this stage. Therefore, it is important for the group to be aware of any future changes to this.

PAs are planned to be on the agenda for one of the future panels. Therefore, the Chair asked the PAPB what they would like the IRISR to look at, in relation to where they think the gaps are in the PA workforce in terms of quality assurance and scrutiny and the Chair can report back on this. Some legislative points were raised, for example, discrepancies between family and non-family PAs, standard of employment in relation to being a good employer, such as ensuring PAs have a contract of employment, but also supporting employers to be good employers through CILs and DPOs and where payment for training lies. The Chair asked the group to contact him if they had any further suggestions to take to the IRISR.

Actions

PAPB-AP128: PAPB members to contact Donald with any suggestions of where they see gaps in the PA workforce in terms of quality assurance and scrutiny that can be looked at by the IRISR panel

8. NEXT MEETING

NEXT MEETING: Thursday 6 April 2023