



Independent  
Living Fund

# twenty-seven



*27 years of  
providing  
independent  
living support*

twenty-seven

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# Foreword

The ILF has provided support to over 46,000 disabled people since it was established in 1988. Over this period of 27 years, the organisation has been able to develop a significant body of expertise and learning regarding the provision of high quality independent living support for disabled people.

The closure of the organisation in June 2015 will see support for ILF users pass to local authorities in England and to new arrangements led by the devolved administrations in Scotland, Wales and Northern Ireland.

As part of the closure of the organisation, the Trustees and Executive team committed to ensuring that we captured our intellectual capital; in order that those wanting an insight into the way in which the ILF had delivered its support could access this beyond the closure.

To this end we established a creative project and we set about looking critically at what the organisation had delivered, how we had made this possible, and what policies, processes, attitudes and approaches had contributed to our achievements.

We took over a large wall in our building to plot an organisational timeline marking out significant moments, decisions, changes and events. We also involved staff at all levels; challenging them to add to the wall their experiences and reflections of their time with the organisation.

Additionally, we spent time discussing the ILF's approach with key stakeholders, including our Advisory Group of disabled people and service users, to gain feedback from them on the areas that were considered to have made the most valuable contribution to the service delivered.

This work culminated in the identification of 27 reflections – one learning piece for each of the ILF's years of existence.

Twenty-seven therefore, presents these reflections, each penned by a different author with specific insight into the subject, as a permanent record of the work of the ILF.



This publication does not seek to suggest that the ILF was an authority on the subjects discussed, nor does it seek to challenge the many other approaches that are operated by other bodies in this area of work. It merely provides an overview of what we did, and gives our view of what worked well based on our accumulated experience.

Twenty-seven does try however, to celebrate many aspects of the ILF that have been acknowledged by others as contributing to the field of independent living support. We hope, therefore, the publication will provide something of a legacy for the organisation.

Most importantly, we believe that by sharing our knowledge, future services for people with high support needs can benefit, even if only in specific areas or small ways, from our experience. The aim of the ILF was to enable the best possible independent living outcomes for disabled people and we hope that the organisation's legacy is that this aim will continue to be realised in the future.

We would like to thank all those who contributed to this publication and extend a special thank you to all of the staff, assessors, partners and friends of the ILF who have contributed to the organisation over the past 27 years.



Stephen Jack OBE  
Chair of Trustees



James Sanderson  
Chief Executive

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*“My enduring first memory of the Independent Living Fund is marching in the sunshine more than three decades ago, to the then Department of Social Security chanting “Support for Independence Now!” We were campaigning for an Independent Living Fund – and the ILF delivered that vision for thousands of disabled people who had once been held captive within their homes or institutions. The ILF was one of our treasured liberators. We mourn its departure as funding and intellectual capital transfers to local authorities. We mourn this because we fear the culture that drives our independent living may get lost in translation.*

*This publication of twenty seven reflections is therefore an essential read for every local authority as they receive the baton of responsibility to maintain our right to independent living which delivers our equal citizenship.”*

*Baroness Campbell of Surbiton DBE*

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# Background

## **About the Independent Living Fund (ILF)**

The ILF was a national resource dedicated to the financial support of disabled people with high support needs enabling them to choose to live in the community rather than residential care. It was sponsored by funding from the Department for Work and Pensions under the responsibility of the Minister for Disabled People. Whilst it was Government funded, the ILF was a non departmental public body which operated as an independent and discretionary Trust Fund managed by a board of Trustees. A legally binding trust deed set out the powers and procedures of the Trustees and the eligibility criteria for assistance from the Fund.

## **History**

The ILF was established in 1988 by the Government in response to concern about the changes brought about by the Social Security Act (1986) which replaced Supplementary Benefit with Income Support. These changes had reduced the income available to some disabled people who might as a result have been forced into residential care. In particular supplementary benefit had included assistance towards the cost of domestic assistance.

The Fund was set up as a charitable discretionary trust under the independent direction of a board of 10 Trustees half of whom were appointed by the Disability Income Group (DIG) and half by the Government (an arrangement that was discontinued after 1993).

The replacement of statutory support by a discretionary trust attracted some criticism, however it had the advantage of expediency and in practice the independence of the Trustees ensured that users' interests were at the forefront of policy development and that the discretionary nature of the Fund was not used as a mechanism to restrict eligibility.

The original Fund was seen as an interim measure until the full implementation of the NHS and Community Care Act (1990), which transferred to local authorities the control of social security money previously used to fund residential care. This money could now be used for residential or, alternatively, community care. The original Fund was wound-up in 1993, but the popularity of direct cash payments to disabled people had been demonstrated, and a commitment was made to maintain a Fund to provide support in part because at the time local authorities were legally barred from making direct payments to individuals.

The Government therefore established two successor Funds. The Independent Living (Extension) Fund continued to administer payments to the 21,500 users of the original Fund. The Independent Living (1993) Fund was open to new applications but on a slightly different basis.

In 2006, the governance arrangements for the two Funds were integrated under a single Trust Deed. At the same time the ILF was reclassified as an executive non departmental public body under the continued sponsorship of the DWP, and ceased to be a charity.

The introduction of legislation in April 1997 under the Community Care (Direct Payments) Act (1996) gave local authorities the legal right to make direct payments for social care provision. However, the initial implementation of direct payments was variable with many local authorities slow to promote them. Access to direct payments was extended in 2000 to include people over the age of 65 and direct payments were embedded as a right within the Care Act (2014) which was implemented from April 2015.

### **Reviews of the ILF**

In line with policy relating to non-departmental Government bodies the ILF was subject to reviews to ensure that it continued to be fit for purpose and effective. An initial review in 2001 made a number of recommendations which were accepted in full, including increasing capital limits and most significantly disregarding earnings from financial assessments.

The 2007 review of the ILF was more wide ranging and made a substantial number of recommendations many of which were implemented by the ILF and DWP, however recommendations which would have led to significant expansion of the fund were not pursued. A final recommendation of the review was that the Fund be incorporated into individual budgets after 2010.

### **Closure of the ILF**

In December 2010, the Government announced that, following a review of the ILF, 'the model of the ILF as an independent discretionary trust delivering social care was financially unsustainable'. In view of this a decision was made to close the ILF permanently for new applications. A full public consultation on the future of support for ILF users was undertaken in the summer of 2012. In December 2012, the Minister for Disabled People announced that the ILF would close in March 2015 with funding and support for ILF users being transferred to local authorities in England and the devolved administrations in Scotland, Wales and Northern Ireland.

In April 2013, following extensive engagement and co-production with disabled people, their organisations and local authorities, the ILF launched a transfer programme to support users through the transition,

In November 2013 following a judicial review hearing the Court of Appeal quashed the Government's decision to close the Fund. All closure activity was subsequently ceased and a 'business as usual' operating programme introduced. In March 2014 the Minister of State for Disabled People announced a new decision that the ILF would be closed on 30 June 2015.

The ILF delivered a comprehensive support programme to prepare all users for the transfer of support including face to face visits, undertaking comprehensive outcome-focused assessments and providing information and guidance throughout the process. The organisation also engaged extensively with local authorities and devolved administrations to support the preparation of the new arrangements.

The ILF will continue to provide a high quality service for users right up to the point of closure on 30 June 2015.

# Our learning

## *learning point 1*

Services should provide people with choice and control and actively seek to remove barriers preventing this

## *learning point 2*

Integration of funding streams and services is key to optimising support

## *learning point 3*

Organisational policy should provide leverage for high standards of independent living support

## *learning point 4*

People should be at the heart of the planning process

## *learning point 5*

Invest in staff to become an employer of choice and reap the customer service benefits

## *learning point 6*

Foster excellent partnerships built on mutual respect and individual commitments

## *learning point 7*

Innovate to create solutions that support people's needs holistically

***learning point 8***

Offer flexible payment methods within a controlled and accountable system

***learning point 9***

Use professional and independent people to undertake assessments

***learning point 10***

Services should not be faceless - direct contact is important for building confidence and trust

***learning point 11***

Financial support should enable full compliance with employment law

***learning point 12***

Services should be based on a social model

***learning point 13***

Complaints processes should be responsive, involve personal contact and enable learning

***learning point 14***

Involve service users in the design of services from the beginning of the process in a fully integrated way

# Our learning

## *learning point 15*

Defined rules can be empowering by providing clear boundaries within which to deliver

## *learning point 16*

Organisations should seek continuous improvement and embrace innovation to meet customer led objectives

## *learning point 17*

If applied carefully and systematically discretion can greatly enhance a person-centred approach

## *learning point 18*

Spend less and achieve more - involve service users in initiatives

## *learning point 19*

Evaluate the service you deliver and ensure you respond to feedback

## *learning point 20*

Communicate in plain English and ensure accessibility is central to any messages

## *learning point 21*

Services should be flexible enough to 'move' with the individual, acknowledging that life is not static



***learning point 22***

Ensure robust procedures are in place to protect public money and safeguard individuals

***learning point 23***

Services should be delivered consistently regardless of postcode yet be responsive at a local level

***learning point 24***

A sound and robust governance structure is essential to enable an organisation to have the freedom to deliver

***learning point 25***

Successful organisations look beyond their own walls and interact with the communities within which they exist

***learning point 26***

Services should be assessed with regard to equality, and the lived experience of individuals should form part of the challenge process

***learning point 27***

Share knowledge to support others towards the common goal of delivering high quality services

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# 1

## Choice and control

*Disabled people have quite understandably called for choice and control for over 30 years. These are the fundamental enablers for independent living, but services can still lack these basic elements from their design. The ILF always sought to embed choice and control in all aspects of its service - recognising that the key to achieving this aim was a continued need to challenge the approach taken to ensure that choice and control could be realised authentically*

### *learning point 1*

‘services should provide people with choice and control and actively seek to remove barriers preventing this’

## Personal reflections from Jesse Harris, Strategy and Social Work Director

We listened to disabled people and their organisations who told us what needed to be in place for people to be included in their community as equal citizens. The fundamental basis for achieving independent living is people being able to explore the choices open to them and being able to put these choices into practice. By co-producing our policy and processes with our Advisory Group of disabled people, made up of ILF users and their organisations, the ILF ensured this approach was respected right up to the point of closure. We ensured people were kept informed and were empowered to understand the choices that were open to them, and more importantly were enabled through our processes, to put these choices into practice.

The fundamental purpose of the ILF was to make cash payments to disabled people with high and complex support needs in order to enable them to realise their independent living outcomes. All ILF policies and processes were correctly researched, reviewed every three years, revised and re-written, on the understanding that everything we did was based on achieving this aim and with the knowledge that a continued review of our approach was required.

Staff and assessor training, development and recruitment, particularly in recent years, was designed to ensure we gave direct person-centred support to disabled people. The first priority for staff and assessors was always the needs and wishes of the people we were there to support. This priority was not lost, even during the closure programme, despite the inevitable personal and organisational adjustment this entailed.

Regular and ongoing communication with all stakeholders ensured our focus was not lost. Other organisations, principally our local authority partners, were kept up to date with any changes, either individually or collectively. We ensured all publications for ILF users were written in plain English and were delivered in the individual's preferred format, taking account of individual support needs, so that access was not denied. Easy read versions were also available for all publications and copies in other languages were provided on request.

Experienced social care professionals, in local authorities and other interested parties, arranged the necessary support for people with a need for high level of advocacy to express their own choices, and provided light touch arrangements, such as assisted self-assessments. Within these arrangements, equality and diversity issues were addressed and reflected in the resultant support plans.

Our strategic and operational governance structures also ensured the necessary boards, panels and groups had an underlying focus on enabling ILF users to have choice and control over their own decisions. Wherever possible, we included ILF users, disabled people and their organisations in these arrangements. Our Trustee Board, Advisory Group and Equality Impact Assessment Board included disabled people, as did our stakeholder engagement events.

By continually reviewing our approach with the input from partners we are pleased that we retained the ethos of choice and control within the organisation right up to the point of closure.

# 2

## Integration

*The ILF occupied a unique place in that it had its foundations within the benefits system and yet delivered support aligned with social care which is normally the responsibility of the Department of Health with delivery being through local authorities. This mix was in many ways the background to the discussion over whether the ILF should exist and, if so, where its natural home should be - central or local Government. With the resolution of this question it has been interesting to reflect on how well the ILF has supported the integration of these two funding streams*

### *learning point 2*

*'integration of funding streams and services is key to optimising support'*

Personal reflections from Keith Turner, Policy Development Manager

The ILF was established in 1988 to provide cash support to severely disabled people as an interim measure until the implementation of community care legislation and a review of social security benefits for disabled people. The Fund was a non-departmental public body of the DWP but worked in partnership with local authorities to enable individuals to continue to live independently in their communities, largely through the employment of personal assistants to meet their care and support needs.

From 1993 the Fund's eligibility criteria was based both upon the benefits system (a user had to be in receipt of the higher rate of DLA or equivalent) and upon local authorities meeting a minimum threshold of social care support. This combination of eligibility criteria proved to be effective in ensuring that the ILF was automatically targeted at people with high support needs. In addition it meant that the ILF effectively had influence over existing funding streams towards meeting independent living outcomes.

The ILF pioneered direct payments within the social care system at a time when local authorities were not legally empowered to do so. The success of this model encouraged changes to social care legislation enabling local authorities to make direct payments.

In addition other aspects of provision that the ILF model promoted have become embedded within the mainstream care system, these include an increased emphasis on care within the community and a drive to personalise services by ensuring that the individual is at the centre of support planning.

At the same time, limitations contained within the ILF Trust Deed, particularly relating to the type of support that could be considered, and the perception that there was unnecessary duplication within the system led some to criticise the model.

Ultimately the ILF was situated slightly outside the mainstream care or welfare system and was only partially able to act as a catalyst for the dissemination of best practice within a joined up personalised care and support system. However, it paved the way for the implementation of direct payments and the associated emphasis on individual choice and control which are now being rolled out beyond social care.

The ILF presented an effective model of integration - enabling core benefits to be used to access additional funds that complimented funding from the social care system. It is clear that future systems need to ensure that integration of services, despite organisational rules and boundaries is key to sustainable delivery.

# 3

## Independent living

*Being able to support people to live independently in a variety of settings requires policy and processes to be responsive, robust and yet flexible to individual requirements. These are sometimes tricky issues to balance, and the ILF approach to supporting people's individual choices informed the development of an Independent Living Policy - a framework that hopefully achieved the right balance to enable outcomes to be fully supported*

### *learning point 3*

‘organisational policy should provide leverage for high standards of independent living support’

Personal reflections from Oonagh Mckay, Principal Social Work Manager

The ILF Trust Deed defined 'Independent Living' as a user living in a non 'care establishment' where they had the same choice and control over the provision of support as someone living independently. The ILF's independent living policy made it clear that the ILF would only make payments where the user had choice over where they lived, who they lived with, who provided their support and what happened in their own home. Furthermore, if this was in a shared living arrangement, then the individual had to have a significant level of 1:1 care in place for the package to be considered viable.

When it was established in 1988 the ILF recognised users and award managers as the experts in their own lives, giving them, via a direct payment, a level of both choice and control to directly purchase their own support. This choice was extended to local authority support recipients in England with the introduction of the direct payments legislation in 1996. In line with Article 8 of the Human Rights Act, cash payments have enabled disabled people to remain in their own home with support since 1998.

Many disabled people saw the ILF as an organisation at the forefront of enabling choice and control.

For those not able to live in their own homes the ILF's independent living policy put in additional checks on the providers of care and support within 'shared care' situations provided by local authorities. As a discretionary fund supporting independent living outcomes, the ILF took additional measures to ensure this was achieved. People living in shared arrangements often do not have the ability or power to exercise choice relating to their care and support. This gave the ILF, through its independent assessors, the ability to advocate on people's behalf to ensure users could assert as much control over their situation as possible. In many ways the ILF provided disabled people with leverage to improve the quality of independent living services available.

The electronic reporting system used by the organisation within the assessment process had an additional set of questions for shared care. Independent assessors checked for example that the user was not obliged to receive assistance from a named agency on the tenancy agreement. They checked that the user had an individually costed care package with a substantial number of 1:1 hours and requested evidence of opportunities for choice and control for the user without which the award could not remain in payment.

ILF assessors, however, were only able to see a snapshot of practice within shared care. It may be the honourable intention of a shared living provider to provide choice and control, and opportunities for a user to have a meaningful presence in their community, but the challenge is to ensure that everyday practice complies with this.

***“With the ILF, the person has ownership,  
control independence and life choices.”***  
**ILF User**

# 4

## Person-centred planning

*The ILF was always resolutely focussed on putting people at the heart of all we did. This might seem like a simple statement synonymous with the approach adopted by many organisations. However, we ensured that this aim permeated all of our activities; by ingraining the approach in our policies, processes, communications and in the way in which we engaged. Most importantly, we made sure the approach was more than a mechanical construct, believing that the best way to achieve it was when it became an attitude rather than a ‘tick box’ requirement*

### *learning point 4*

‘people should be at the heart of the planning process’



Personal reflections from Jesse Harris, Strategy and Social Work Director

Person-centred planning was promoted as a measure of good practice in the Valuing People Report (Department of Health 2001) where it was concluded that the user is the expert on establishing their own needs. It can also be viewed as a human rights issue for disabled people reflecting a ‘nothing about us without us’ approach and their wish to be in control of their own support.

As part of our biennial assessment, the ILF viewed the system of support planning as a tripartite agreement between the organisation, the user and their local authority. Assisted self-assessment was promoted by the use of professionally qualified, independent assessors. Our aim was to ensure that the assessment process was wholly led by the desired independent living outcomes of the user.

The ILF Trust Deed had a defined list of what funding could be used for. While this might be seen as a way of limiting support, an assessment process that starts with an understanding of what outcomes a person wishes to achieve can actually enable a flexible use of funding whilst at the same time remaining within the defined criteria.

The principle of person-centred, outcome-focussed reviews is something we took to new levels in preparation for the closure of the ILF and the transfer of support to local authorities in England and the devolved administrations in Scotland, Wales and Northern Ireland. We were guided by the current policy drive for personalised budgets and direct payments and the system we adopted was informed by the Department of Health guidance on outcomes and by working with a small number of local authorities in the North West of England. The separation of outcomes into those that maintained a current lifestyle and those which were aspirational helped to identify what people needed to continue to live independently and what they wished to achieve in the future.

We always expected the ILF user to attend their review. For some people dependent on their condition or impairment, we accepted that they might find attendance difficult. However, we expected the independent assessor to see the individual user, even if this was at another time and place, to ensure that future plans were based directly on their wishes and aspirations and their lived experience.

We ensured that equality and diversity issues were covered within the review as defined by the individual and that our quality assurance system was based clearly on the individual achieving independent living outcomes that were meaningful to them. Our Advisory Group and the organisations they represented were key to our adopting this outcome based person-centred reviewing system. The support plans produced by the transfer review process ensured that outcomes were aligned with how local authorities will hopefully work with disabled people in assessing their future support needs.

Our approach ensured that people were placed at the centre of the planning process in order to build the type of support required to deliver individual control.

# 5

## Culture

*An organisation's success is undoubtedly linked to the level of engagement with, and the commitment of, its staff. One example that highlights the achievements of the ILF in developing a positive environment comes from the reaction of its staff to the decision to close the organisation. Not one question that immediately followed the announcement related to the impact on staff, and furthermore we were then overwhelmed with people cancelling their Christmas leave in order to support the critical communication process. It would be great to be able to say what the single magic ingredient was for achieving this but in reality multiple factors contributed to a culture that delivered what was required*

### *learning point 5*

*'invest in staff to become an employer of choice and reap the customer service benefits'*

Personal reflections from Gillian Smith, Head of Human Resources

In 2011, the ILF introduced a culture statement - *'We are committed to working together positively, with trust, respect, and honesty, while taking pride in our work and what it helps others to achieve.'*

The statement was created by employees to describe how they expected to work together. Consistent feedback demonstrated that our employees believed in the values set out in the statement. It was clear that they took great pride in their work and the difference they felt the ILF made to our users' lives. This undoubtedly made coming to work more meaningful and rewarding.

In 2000, the ILF had around 90 employees. At that time long standing employees described the ILF as a family and a fun place to work. By 2003 the organisation had increased in size to circa 180 employees.

The increasing size of the organisation required the adoption of a more business focussed approach. Although this undoubtedly had an effect on the culture of the ILF, the one constant throughout this process was the satisfaction employees gained from coming to work. In our staff satisfaction survey in 2012, the engagement levels were 92% against a national average of 78%; this was achieved at a time when we were also running a voluntary exit scheme to reduce the size of the organisation by a third and discussion regarding potential closure was at its height, which might reasonably have had an impact on such results.

Our employee satisfaction levels were also evidenced by our key performance indicators: staff turnover prior to commencing organisational closure was less than 2% and the average length of service stood at 12.5 years. With such little turnover we ensured that the skills mix was improved by encouraging people to undertake self-directed learning and we created development opportunities in the form of new roles, promotion opportunities, and lateral moves, or participation in projects which ensured that people continued to grow with the organisation. We also respected people's work life balance with 50% of our employees working on a part-time basis.

We had an internal communication strategy in place, which not only involved fortnightly managers' meetings, but also the opportunity for staff to ask the Senior Management Team questions and receive a direct response. Full staff meetings, chaired by the CEO were also introduced and frequent blogs ensured staff were continually kept in the loop.

In 2012 the ILF increased its Investors in People accreditation from bronze to silver. This recognised the value we placed in employees and that our HR policies and procedures were best practice. We also actively valued diversity and retained the Positive about Disability two-tick symbol for seven years in recognition of our positive commitment towards employing disabled people.

Overall, we felt proud to have created a positive environment at the ILF that enabled us to deliver the commitments set out in our culture statement. Our hierarchy was relatively flat, the senior team always adopted an open approach to communication, and we worked hard to engender a spirit of co-operation based around a collective passion for supporting disabled people to achieve their goals.

***“In spite of the need for necessary policy changes over the years the principle of supporting disabled people to live in their own homes remained key and that is what the organisation has always fought for, however many staff came and went, the culture and essence was embedded.”***

***Nicky Crosby  
IT User Support Manager***

# 6

## Partnerships

*Maintaining strong partnerships with local authorities was a constant challenge for the ILF requiring it to navigate through the different systems in place within the 210 UK authorities that we worked with to jointly support users. This relationship had its inherent tensions, however, it was also incredibly successful in achieving a mutually respectful partnership in the common pursuit of providing the best possible support for disabled people. This partnership was also strengthened significantly in order to enable the most effective transfer of support*

### *learning point 6*

*‘foster excellent partnerships built on mutual respect and individual commitments’*

Personal reflections from Charlotte Gandhu, Senior Local Authority Engagement Manager

From 1993, the ILF and local authorities across the UK worked in partnership to provide support packages which assisted users to remain active within the community. The system operated as a tripartite agreement between the disabled person, the ILF and the local authority with each having obligations to meet for the agreement to succeed.

Over the years the ILF became a valuable and ring-fenced source of funding which local authority social workers were able to support people to access. By gaining ILF funding users were able to access additional support to that which local authorities provided through Fair Access to Care Services and integrate these two funding streams for positive results.

The ILF had a specialist local authority engagement team that developed a UK wide network of local contacts, some of whom worked alongside the ILF for more than 15 years. Originally, the team promoted knowledge about the ILF and improved the quality of applications to the Fund. With the commencement of the transfer review closure programme in 2013 the team pursued strategic collaboration to promote partnership working in order to ensure a smooth transition to full local authority control of the funding and support for users.

During the final closure programme these local authority contacts were strengthened to further support transfer activity. The ILF held events for local authorities at both the start and towards the end of the transfer programme. We provided information and support to local authority colleagues and collaborated at a local level to support the transfer programme. The success of this close partnership was demonstrated by an increase in the number of joint review visits being undertaken, which rose from 64% for biennial reviews to 85% at the height of the Transfer Review Programme.

The ILF was also actively involved in innovative developments within social care. Between 2005 and 2007, we worked with 13 local authorities as part of the Department of Health's Individual Budget pilot. This pilot tested the possibility of six funding streams collaborating to improve outcomes for disabled people; by attempting to remove barriers to accessing funding and services. This experience informed the ILF participation in the Right to Control trailblazer run by the Office for Disability Issues between 2010 and 2013. It consisted of six social care funding streams working across seven trailblazer areas. Working in conjunction with the trailblazers, the ILF was able to work with an amended Trust Deed and develop policy allowing users to manage funding to meet support needs in ways other than employing care. This development came alongside an outcome-focussed approach to assessing users, the ability to pay awards in advance (matching local authority practice) and a greater focus on how ILF's funding made a distinct impact on people's lives.

In 2013 the ILF adopted outcome-focussed reviews and a flexible funding policy for all users nationwide to support them through the transfer to local authorities.

The collaboration with local authorities was of course not always perfect, however, the ILF model proved effective in enabling a central funding stream to be integrated with local provision, supporting individuals to access the most effective support possible.

# 7

## Holistic support plans

*The ILF always sought to be innovative, developing solutions and services that advanced what had gone before. When the decision was taken to close the ILF this approach could have easily been set aside and the decision made that existing systems and process were sufficient enough to see the organisation through to the point of closure. If anything, the decision made us more determined to seek new solutions and the development of the PRO model is one such example of where we refused to stand still. The PRO model in many ways represented our 27 years of intellectual capital – a solution to producing a holistic support plan that brought together our understanding of independent living for people with high support needs with the lived experience of disabled people themselves*

### *learning point 7*

*‘innovate to create solutions that support people’s needs holistically’*

## Personal reflections from John Denore, Head of Operations

The PRO model was a term developed by the ILF to encapsulate the support plan provided to users in readiness for the closure of the organisation. PRO stands for the three essential and interdependent elements of a support package, namely Provision, Resources and Outcomes.

Throughout the history of the ILF, users' packages were based on a required level of provision and the funds required to pay for this provision. Independent assessors would review the support users required in terms of personal assistant time and other resources and the ILF would then translate this, through standardised calculations, into an appropriate financial commitment.

When the closure of the ILF was announced in December 2012, the Minister for Disabled People gave a firm commitment that the ILF would maintain the existing level of support provided to each user up to the point of closure. Each user would continue to receive the level of funding required to meet their current agreed package, in other words their provision and resources. However, with closure imminent, the ILF was aware of the need to support users through a potentially difficult transition in their funding arrangements. To do this, it was critical that users were fully informed about what their support package was for and how it was funded. The PRO model gave each user a holistic support plan that would detail their care package at the point of transfer, including the resources required to deliver that support. This individually tailored support plan could then be used when discussing future needs with local authorities, or dealing with the new arrangements determined by the devolved administrations in Scotland, Wales and Northern Ireland.

To assist users in making the transfer to full local authority funding, it was important for each individual to develop the outcomes that they wanted to achieve with their particular package. The ILF created outcome domains, based on Department of Health guidance, to support this process and these were tested ahead of the transfer programme commencement with a number of local authorities and our Advisory Group. Once established, the outcome domains became a key element of the support plan and were discussed with all users as part of their transfer review.

The outcome domains were the missing ingredient that ensured the PRO model provided the most effective method of support for users. Confirming the desired outcomes to be achieved by a user through the use of ILF funding was key to ensuring they had a holistic picture of their ILF support. Most importantly, the PRO model helped to put users in control by giving them the complete picture required to support them in assessing and understanding their future needs.

# 8

## Agile payments

*Balancing the desire to provide optimum flexibility with the necessarily strict compliance required in the management of public monies presents distinct challenges. An inherent tension between these two aims existed within the organisation through our history. The mechanisms behind providing people with choice and control on the one hand and ensuring adherence to a set of absolute rules and restrictions on the other hand needed to be both robust and agile. Achieving the right position meant compromises on both sides, but overall the ILF model demonstrated a unique way of balancing these competing priorities, using the framework laid down as an enabler of, rather than a barrier to, empowerment*

### *learning point 8*

*'Offer flexible payment methods within a controlled and accountable system'*



## Personal reflections from Alexandra Wyatt, Financial Controller

Through payment flexibility people were able to manage their lifestyles and independence more effectively.

The primary objective of the ILF was to support users in achieving independent living. What makes an individual's life an independent one of course varies from person to person. Similarly the pattern and amount of funding required depends entirely on the individual, their circumstances and their objectives. In some circumstances the drivers will be lifestyle choices, for example attending university, and in others the drivers will be lifestyle situations due to individual support needs, impairments or fluctuating conditions which might require varied levels of support. More often than not it will be a combination of the two.

In order to enable users to achieve an independent life, the ILF developed a payment system which offered a range of payment patterns, to suit those individual requirements. These ranged from:

- a standard weekly award;
- a standard weekly award for part of the year and an enhanced award for the remainder, where the responsibility was with the user to notify the ILF when the enhanced award was needed;
- a cyclical award, which spread the enhanced award evenly over the year. This required good budgeting skills on the part of the user, but removed the responsibility of notification;
- payment on receipt of invoice for care incurred, capped at the offer maximum; and
- an immediate payment facility, responding to the often unexpected needs experienced by ILF users outside of their usual payment cycle.

The choice of payment method was determined by a combination of user preference, independent assessor recommendation, and caseworker ratification. The organisation, however, had a responsibility to manage public money appropriately, and to comply with that duty, a payment security team needed to have the authority to recommend or even enforce payment options.

From a payment processing point of view, the ILF software aggregated the awards payable on the day of payment, covering the previous four weekly commitment and taking account of all nuances of individuality. These were then converted into a single BACS payment, making it a very efficient and simple process for the finance team to administer and control.

All offers were input on an annual basis, and only required administration by the caseworker when either invoices were received, enhancements were activated or deactivated, or a new offer was implemented. Consequently, all the data was available to accurately forecast the annual financial commitment to users. This was essential to enable the ILF to manage its own funding and continue to support users effectively.

# 9

## Independent assessors

*The ILF used independent social care professionals across the whole of the UK throughout its 27 year history in order to carry out face to face assessments with people in their own homes. We received consistent feedback from users on how much value they placed upon the relationships that developed through our efforts in maintaining consistency of the individuals carrying out repeat visits. The separation of assessments by independent social care professionals and comprehensive decision making processes undertaken by experienced caseworkers proved to be a valuable model that in many ways pushed both sides to be more effective in delivery*

### *learning point 9*

*‘use professional and independent people to undertake assessments’*

Personal reflections from Eddie Januszczuk, Senior Social Work Manager

The ILF undertook a regular review of all ILF users' care and support needs to ensure packages remained effective and appropriate. These reviews enabled us to audit how people had used their funding and to undertake a comprehensive, person-centred, outcome-focussed review of their future care and support needs.

Initially the ILF had 'Visiting Social Workers' who later became 'Independent Living Fund Assessors', and finally 'Independent Assessors'.

Newly recruited assessors were registered with the relevant professional body. They had a Disclosure and Barring Service and reference check and had to successfully complete a three day induction programme followed by two observed visits with an experienced assessor before receiving an ILF contract. Initial monitoring by a Senior Social Work Manager of their first completed reports ensured that they met a satisfactory standard to conduct review visits.

Social Work Managers provided distance management by regular, on-going communication with assessors through email, newsletters, telephone calls, group teleconferences, including regular sessions with the CEO, and annual regional study days. The Social Work Team also ensured that every postcode within the UK was covered by an independent assessor and that the work of assessors was of the highest standard. A comprehensive quality assurance system ensured that all assessors had a proportion of their reports checked every two months and received feedback highlighting good practice and any areas for improvement. Their work was also monitored through user satisfaction surveys where assessors regularly received high praise for their work.

Over 329 independent assessors have undertaken work for the ILF. Their passion and commitment throughout our history contributed massively to the overall levels of independent living support we delivered.

Assessors used their social care skills, knowledge and experience to conduct person-centred reviews involving the user, award manager, local authority representative and other relevant parties. The purpose of the visit was to provide information for a support plan which included the user's specific outcomes; how they wanted to use ILF funding to support them in their daily life together with any arrangements that needed to be considered by the local authority. Working in line with the ILF policy framework, assessors had the flexibility to make recommendations to enable users to achieve their desired independent living outcomes.

As a critical element of the transfer review programme, between April 2013 and December 2014, some 17,500 ILF users were provided with a comprehensive review of their support needs, in their own homes, with an independent assessor.

***“I consider myself fortunate to have worked for such a client-centred and ‘can do’ organisation as the ILF for the past 14 years. The ILF is the most efficient organisation I have worked for.”***

***Independent Assessor***

# 10 Direct contact

*A user of the ILF remarked at a meeting a number of years ago that, beyond the obvious enablers of financial support, the ILF had provided her with the confidence to live independently due to the direct support of a named caseworker. The ILF strived to ensure it was not a faceless administration and attempted to create an environment where service users had strong links with the organisation. Ensuring that the ILF was an employer of choice for people delivered low turnover levels and consequently enabled consistency of individual support for users that was often maintained for many years. Putting an individual face in front of the necessary systems and processes was a clear achievement*

## *learning point 10*

*‘services should not be faceless - direct contact is important for building confidence and trust’*

## Personal reflections from Suzanne McCallum, Head of Service Delivery

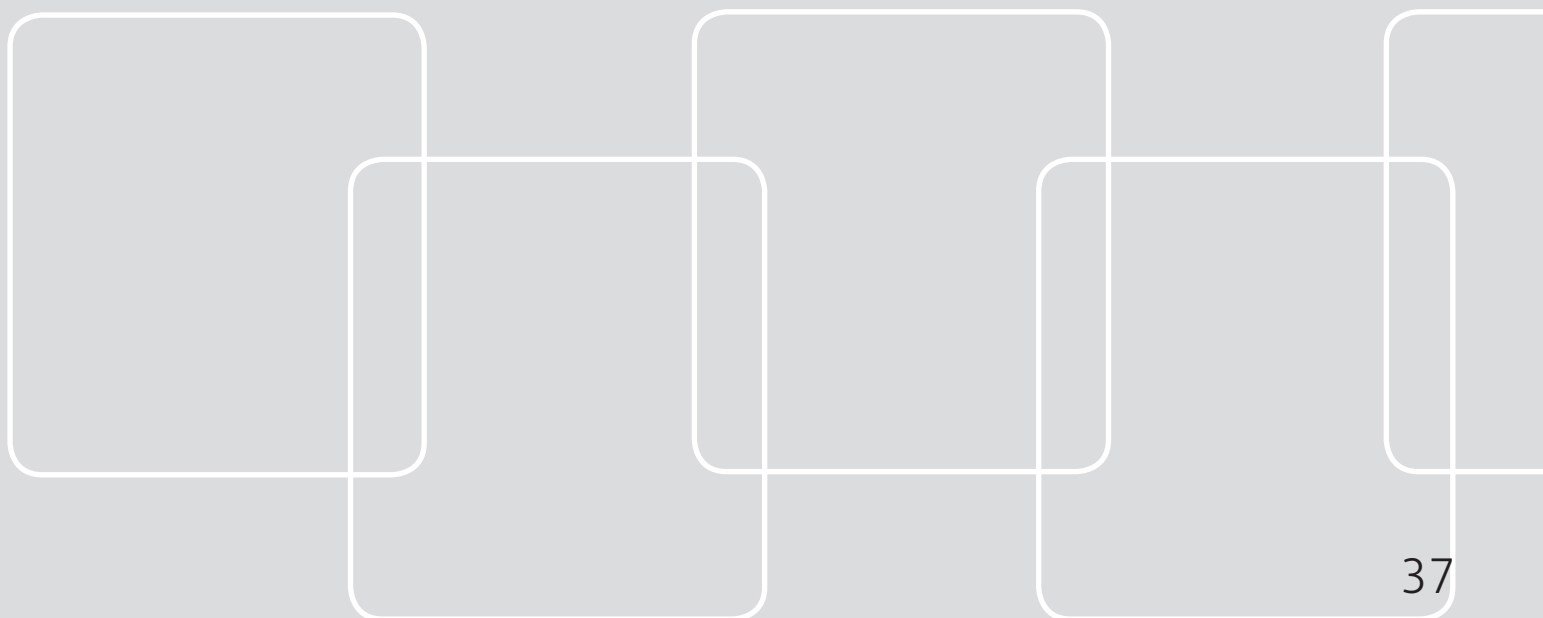
For the ILF, direct contact was an approach that underpinned our relationship with users, their representatives and local authorities. As a small albeit UK wide organisation, the more personal approach was something all aspects of the business endeavoured to maintain. For Service Delivery teams, this was not only about providing a high quality customer service but also quality person-centred customer care.

From the organisation's inception in 1988, ILF users were assigned named caseworkers who were able to develop a strong understanding of individual cases and often provided service on first name terms. Maintaining this personal contact was always a driver for the ILF. For example, incoming telephone calls were dealt with by a person rather than an automated 'call centre' type system. Our caseworkers did not have answer phones, and letters and emails were always sent by a named person to enable direct return contact. As we sought improvements in what we did, direct contact was always a key factor in our thinking and plans.

Service delivery caseworkers not only administered their users' ILF awards but over time were able to build very positive relationships with users and their representatives. One of our caseworkers saw their efforts to deal with a particular user's queries develop from a somewhat 'frosty' and wary view of the ILF into that of a customer satisfied with the service provided and a strong trust in the caseworker who had taken time to listen, guide and reassure them. Trust that had been lost was regained and difficult issues arising were dealt with on a level that supported the user throughout.

Direct contact was not only beneficial to users and their representatives when dealing with the ILF but also created a positive experience for staff carrying out their day to day roles as it enabled them to understand how they were making a positive difference to someone's life.

The pressure of delivering a high volume administration can result in bureaucracy removing a personal approach. However we managed to find a way to balance the need for efficiency with an enduring desire to maintain a strong personal approach.



# 11

## Employer support

*The challenge of being an employer in order to manage your own independent living support needs is a significant one for many people. However, the benefits of taking on this responsibility are equally significant, and can be an integral part of leading an independent life. The ILF served to balance the position for users as employers by providing quality support and guidance, ensuring compliance with employment law responsibilities, but at the same time allowing individuals to develop the independent relationships they needed to achieve their goals through this unique relationship*

### *learning point 11*

‘financial support should enable full compliance with employment law’

Personal reflections from Helen Sanderson, Policy Development Manager

‘Making choice real for disabled people’ is a statement that embodied everything that the ILF aimed to achieve. For many ILF users, directly employing their own personal assistant (PA) enabled them to exercise the ultimate choice and control, providing them with autonomy over how and when their support was provided rather than relying on a schedule dictated to them by others.

Being an employer, any employer, is not without its challenges; not least in ensuring compliance with UK employment law. However, without a human resources team to support you, and when your employee is perhaps additionally a friend or family member who will be providing support of sometimes an intimate nature, often within your own home, the challenges are magnified. The unique employer/employee relationship that is created is one that must be carefully managed by those involved.

The ILF recognised a direct need for attention being given to the challenges facing users who were employers and as a result an internal project was delivered to assess the support offered by the ILF and how this could be improved. Restrictions imposed by the ILF governance documents meant there were some limitations to what could be introduced. However, the project resulted in the development of a comprehensive and accessible suite of formal employer support policies that were first introduced in 2007 and evolved and improved over time in response to need.

The primary objective of the policies was to provide the funding to enable users to meet their statutory obligations, for example, by automatically introducing holiday pay and National Insurance Contributions inclusions into an individual’s award and making money available for employer liability insurance costs. In addition, policies were devised to include other elements considered to be of vital importance for an employer, such as paying for a payroll service and covering advertising costs. These policies were communicated to users through clear and accessible literature along with information about responsibilities and appropriate signposting.

Due to the unique way the ILF calculated individual offers using actual support and employer costs, rather than using averaged, non-specific rates, the ILF was provided with a reasonable assurance that care and employer costs were being fully met minimising the risk of a shortfall to the user.

The ILF made cash payments to users to empower them to lead the lives they wished to lead. To make this meaningful, users needed to be free to choose who provided their support and when. This was made possible in many cases by the ILF commitment to provide the individually tailored financial support required to enable users to directly employ their own personal assistants where this was the preferred choice.

Prior to the closure of the organisation, the ILF worked in partnership with Acas (Advisory, Conciliation and Arbitration Service) in order to produce a specific guide to employing PAs. We are pleased that this enabled the ILF to continue to provide support to users in this area even beyond the life of the organisation.

***“ILF funding has enabled me to take on my own responsibility and organise my own life. I am able to give people jobs, go to work myself and be a positive member of society, as well as have some fun.”***

***ILF User***

# 12

## Social model

*The social model of disability was a foundation stone for the ILF alongside equally important philosophies such as Choice and Control; “Nothing about us without us” and person-centred planning. Aside from the integration of the ethos of this model into our processes we also focussed hard on ensuring that the language we used and our approach to situations also matched our commitment to following it. One example of this was our enduring dislike of the term ‘people with disabilities’ which we ensured no member of staff would ever use. We hope that our contribution over 27 years went some way to removing some of the daily barriers faced by people*

### *learning point 12*

*‘services should be based on a social model’*



Personal reflections from Jennie Walker, Head of Corporate Affairs

The social model of disability has its foundations in the document 'Fundamental Principles of Disability', written by the Union of the Physically Impaired against Segregation, which says that "it is society which disables physically impaired people". The social model has been developed and is understood to mean that disability is caused by the way society is organised, rather than by a person's impairment or difference. It looks at ways of removing barriers that prevent disabled people from taking part in the community.

The ILF adopted the social model of disability at an early stage and was one of the first public bodies to do so. This shaped ILF policy and procedures in a number of ways and helped the ILF to focus on how users could be supported to meet their desired outcomes.

The ILF assessment never focussed on medical definitions and was always carried out by social care professionals, whose focus was to discuss the support an individual required to enable them to carry out activities.

Although the ILF definition of 'Qualifying Support and Services' was not without some controversy, it supported the social model by focusing on the tasks that the user needed support with, rather than their impairment. This was further enhanced when the ILF launched its outcome-focussed reviews, taking the approach to activities it could fund closer to the social model.

Through the Right to Control Trailblazers the ILF was able to explore a more flexible approach to funding. This approach concentrated upon the outcomes that individuals wished to achieve and allowed them to consider alternative ways of meeting these outcomes other than through the direct employment of personal assistants. Some service users utilised technology or equipment in a way which overcame barriers for them and therefore demonstrated the difference that can be made to people's everyday lives once a societal barrier is removed.

The ILF policy ensured that any change in provision was initiated and benefited the individual service user and that the service user was involved in planning their support package. This approach contrasts with one which presumes that equipment is simply a cost effective substitute to personal support. The positive feedback that the ILF had regarding the option of using funding more flexibly meant that as part of the transfer programme the ILF encouraged users to consider how a more flexible use of funding might facilitate the transition to local authority support.

The ability to implement the social model of disability in this way was a real strength of the ILF and a significant benefit for its users, who have identified their own solutions and approaches to removing barriers.

***"The ILF gave me my independence  
in all aspects of daily life."***

***ILF User***

# 13 Customer service

*You can't always get it right, but you can at least try to put it right when things go wrong. The ILF user satisfaction levels were always strong. At the end of our transfer review programme we were consistently achieving a 98% rating. However, it was always important to us that when things went wrong and people needed to complain that we not only tried our best to resolve their complaint, but that we also took learning from it. Complaints led to changes in processes and approaches regardless of how minor these issues were. In striving for quality it is important to listen to all voices*

## *learning point 13*

*'complaints processes should be responsive, involve personal contact, and enable learning'*

Personal reflections from Eleana Price, Customer Service Manager

The ILF aimed to provide a high standard of service to all its users throughout its history. There were of course occasions where someone wished to make a complaint. The aim of our complaints procedure was to identify aspects of our service that needed attention in pursuit of a quest for continuous improvement.

The ILF recognised that our users had different preferences with regard to communication and it was therefore important that our complaints and appeals process was open, transparent and accessible. A dedicated customer services team was responsible for acknowledging and responding to any initial complaint, which could be received by telephone, email, letter or fax.

We aimed to telephone the user or their representative within two days of receiving a complaint. This meant that we could introduce ourselves in person as the dedicated individual dealing with the case; explain timescales for an expected outcome; discuss the nature of the complaint and what they hoped to achieve by way of an outcome. We found that through this personal approach, users were often satisfied with our initial telephone call as a resolution to their complaint and did not wish to pursue the matter any further.

We established a target of a total of 15 working days to outcome a complaint from the date that it was received at the office. We kept users informed of our targets for acknowledging and responding to complaints and we published a clear policy, formalising the process and made this available on our website.

The Parliamentary and Health Service Ombudsman suggest that an appeals process is:

***“simple, clear, involving as few steps as possible. Having too many complaints handling stages may unnecessarily complicate the process and deter complainants from pursuing their concerns”***

We shortened the escalation process in line with this so that each case referred to the customer services team would have only two stages of our internal appeals process to go through.

If the user or representative was not satisfied with our response, they could request that the case be escalated to the Chief Executive. If they were not satisfied with that response, we would then signpost them to the Independent Case Examiner (ICE). ICE undertook free and impartial reviews into complaints about our service, for example, identifying if we had taken incorrect action or misinformed our users.

The ILF had the power to make ex-gratia payments to compensate for financial loss, gross inconvenience or gross embarrassment. In 2013/14, the ILF made an ex-gratia payment to just four users and responded to a total of 40 complaints. This represents a very low volume of complaints made in comparison to the 18,000 users who received our payments.

# 14 Co-production

*Declaring your services are person-centred is not enough. To ensure services are truly person-centred you need to ensure that they are not just produced with people 'in mind', they should actually be produced alongside those people for whom they are intended. The ILF always had a strong approach to engagement through user groups and various regional meetings, but it was a move to fully embrace co-production that led to some of the best service enhancements the fund delivered during its history*

## *learning point 14*

*'involve service users in the design of services from the beginning of the process in a fully integrated way'*

Personal reflections from Sue Bott CBE, Director of Strategy Disability Rights UK and ILF Advisory Group Member

The ILF always took its users very seriously making sure that it was easy for them to contact staff. In the early days that was it really – you could make contact about any particular query you had but not much else. As the years went by and the movement of disabled people demanding to be heard grew, the Fund began to think that maybe just being able to contact was not enough.

So ILF users found that they now had opportunities to respond and be consulted about proposed policy changes and ways of doing things. The Fund thought hard about how they could consult disabled people in a way that was not just tokenistic but was accessible and responsive. They sought the advice of disabled people's organisations to make sure that they got their consultation and discussion forums right.

But even that approach was not enough. Consultation was one thing but that was always after someone else had come up with the ideas. What was needed was a way whereby people using the Fund could have a say on everything and come up with their own ideas. In 2009, thanks to the efforts of one of the Fund's Trustees, Nick Danagher who just happened to be a disabled person and a user of the Fund, the Advisory Group of users and representatives of disabled people's organisations was set up.

This was co-production in action and meant the ILF were pioneering the concept even before the word became fashionable. The Advisory Group met several times a year and saw all the papers that were being shared with staff and most of the papers seen by the Trustees except where legal restrictions prevented this. Many lively discussions took place with disabled people telling it how it really was. During their existence the Advisory Group changed proposals, enhanced policy and information and came up with actions of their own.

***“The Advisory Group was the perfect way for ILF users to feed in our expertise, giving a new viewpoint on the running, and development of the ILF. There was a richness, of people’s varied knowledge, skills and experience, and a shared passion to make the ILF the best it could be. Our comments, thoughts and ideas were taken on board and evident in policy and documentation with Trustees and senior staff, including the chief exec, present at our meetings. This demonstrates the value they put on our group!”***

***Jenny Hurst  
ILF User and founder member of the ILF Advisory Group***

# 15 Clear structure

*Having very clearly defined criteria could be viewed as creating a structure that is inherently restrictive. However a clear operating framework with established boundaries can also be empowering in its nature by enabling an organisation to focus support more clearly on its target group. The ILF faced criticism from some due to the restrictions imposed on what funding could be used for but this criticism rarely came from users who had the confidence of a defined package of support that was transformative to many lives*

## *learning point 15*

*‘defined rules can be empowering by providing clear boundaries within which to deliver’*

Personal reflections from Keith Turner, Policy Development Manager

The ILF was always targeted at individuals with the highest care and support needs, with the intention being that the funding enabled people to live independently within their communities rather than in residential care. The defined purpose of the ILF required it to have clear on-going eligibility criteria and rules which ensured that the organisation was able to meet its intended purpose.

The ILF eligibility criteria evolved through time, in part this was due to the need to focus expenditure on a specific demographic, but it also reflected an increasing awareness of the support needs of users. So whilst the eligibility to access funding became more targeted over time, the policy relating to the use of funding was refined to provide greater support for users.

To be eligible for the original Fund in 1988, applicants needed to meet the following criteria:

- be living independently in the UK with unmet personal or domestic care needs;
- be in receipt of or be eligible for attendance allowance (or equivalent); and
- be in receipt of income support or have insufficient income above this level (after paying for housing costs) to meet the costs of personal or domestic care needs.

These basic criteria remained broadly unchanged though supplementary criteria were subsequently added to in order to ensure sustainability. These included:

- the introduction of an age criteria which meant that the Fund was subsequently targeted at people of 'working age' between 16 and 65 years old; and
- the requirement after 1993, that local authorities provided a minimum level of support (initially £200 but increased subsequently to reflect inflationary pressures and the need to work within a defined budgetary limit).

The change to the local authority contribution threshold initially resulted in a substantial reduction in admissions, but over time it proved more cost effective for local authorities to contribute to a package of support for someone with substantial care needs than to use residential care as a solution, so by leveraging local authority resources the ILF continued to make a significant difference to the choices available to its users.

The ILF increasingly set out to define policy and process to ensure that there were logical and transparent rules relating to the use of money. This always related to costs associated with purchasing of personal and domestic care and was set out in the Trust Deed. The targeted nature of the funding allowed individuals to achieve their support needs more precisely and supported the ILF to manage the budget effectively.

With the introduction of the personalisation agenda there was an element of criticism that the Fund was too restrictive in how money could be used, although this was not reflected in the feedback that ILF users provided. ILF users' experience was often that the provision of the support provided by the ILF enabled them to have greater choice and control over their lives than the support that was available from local authorities.

The success of the Fund in maintaining and enhancing the independence of users in an effective and professional manner can in part be attributed to its focus on achieving a specific purpose.

# 16 Operational delivery

*Balancing the need to deliver a flexible and person-centred service with the systems and controls required to ensure an efficient and secure operation was always a challenge we embraced extremely enthusiastically. We aimed for continuous improvement, never settling for where we had got to, always seeking the next goal or challenge. This quest was as determined through times of expansion as it was during the run up to closure where innovation became a critical tool to support the new and complex activities required of our teams. Our approach to dynamic change programmes and systems design required cultural change at times in order to realise the desired benefits and hopefully our results demonstrated that the effort was worth it*

## *learning point 16*

*'organisations should seek continuous improvement and embrace innovation to meet customer led objectives'*



## Personal reflections from Joel Major, Principal Programme Manager

The ILF always aimed to provide a high quality of service to users alongside one that demonstrated value for money. To achieve this the ILF approached service development by moving away from the more cost-focussed command and control approach to one that concentrated on the management of work flow and understanding of the variations required to support the complex requirements of those we supported.

Rather than take a simple view of work as separate linear activities, the ILF tried to follow a more holistic approach and consider the delivery of service as a dynamic complete system with influence upon this coming from, and requiring appreciation of, a range of factors both internal and external.

In basic terms this meant carrying out an initial mapping process across all parts of the organisation to check what factors needed to be addressed, and what effect these had on delivery of, for example policy directives, communications, user support and payment assurance. This was delivered in hand with an inclusive, rather than directive, bottom up change management approach to encourage a culture of continuous improvement.

This approach enabled the ILF to move away from separate specialised, but less flexible team working, to a system where teams were capable of managing and planning work delivery across all areas of their administrative responsibility. This resource and workflow flexibility was supported by building in policy controls to maximise casework accuracy whilst retaining discretionary flexibility in processing.

We applied an agile methodology to IT development, allowing for a high level of end user involvement, regular development reviews and use of prototypes. This meant that the system delivered, accurately matched the designed process and could incorporate changes in policy during the development life cycle, whilst at the same time ensuring that the project did not lose focus.

This approach was also beneficial in preparing operational teams for the product at an early stage, which simplified implementation and enabled new processes to be developed and introduced in a very short timescale - despite occasionally having very little planning time.

A further approach developed was to create IT systems that delivered Management Information (MI) focussed on measuring workflow to identify repeat action or failure demand and encourage use of more beneficial contact methods. MI provided information amongst other things to ensure that caseworkers used the most suitable method of communications and processed work accurately. Our systems also ensured that repeat errors or misunderstanding by operational staff could be tracked and changes in processes or communications made to improve these.

Our work in this area delivered significant benefits, including:

- greater staff engagement and ownership with change management;
- increased flexibility and change response across systems;
- reduced workflow measures;
- reduced resource requirements;
- improved casework and payment assurance accuracy;
- improved user communication products which supported user satisfaction;
- improved data access and data security through reduced file movement; and
- availability of detailed performance measurement and demographic information to support development and strategic planning.

# 17

## Discretion

*When the ILF was established in 1988 as a charity overseen by a board of Trustees, some campaigners voiced their opposition calling for ‘rights not charity’. The issue of discretionary decision making in relation to the provision of support for disabled people has been a subject of debate during the ILF’s history. However, despite controversy, the ILF model has demonstrated that positive outcomes can be achieved for individuals if discretion is properly, fairly and consistently applied. This has been, in the main part, down to Trustees who gave their considerable time and experience to overseeing the governance of the organisation and remaining committed to achieving the best outcomes possible for those we have supported*

### *learning point 17*

*‘if applied carefully and systematically discretion can greatly enhance a person-centred approach’*

## Personal reflections from Keith Turner, Policy Development Manager

The ILF was set up as a discretionary Trust Fund under the direction of a board of Trustees. By its very nature a discretionary trust affords a greater degree of flexibility in applying policy than that given to a body administering a statutory benefit. This discretion can be particularly useful when pioneering new ways of working. Nevertheless, at the time of its inception many disability campaigners opposed this arrangement, arguing that replacing a statutory benefit with discretionary payments undermined peoples' legal entitlement to support.

ILF funding was targeted at a specific group of individuals and it was always intended that the purpose of the funding was to enable individuals to live fully inclusive independent lives. In laying down the eligibility criteria and detailing how funding could be used, the ILF Trust Deed and Conditions of Grant provided a supporting framework that directed and fettered the power of the Trustees, ensuring that the Fund met its intended purpose. However, considerable discretion remained and if incorrectly applied could have opened up the Fund to challenge. Therefore in order to ensure consistent application in delivering this purpose, and to reinforce good practice, the ILF also set out publicly available policy documents providing guidance to administrators, local authorities and users or their representatives. This provided an essential route to delivering a transparent and efficient service and allowed individuals to challenge decisions where appropriate.

Nevertheless, no set of policies could comprehensively cover all eventualities without becoming unnecessarily cumbersome and restrictive. The very complexity of ILF users' supports needs, their changing circumstances and ambitions, meant that there was a need to allow discretion in decision making and feed this back into policy.

The ILF Trustees played a key role in this by acting as a top level of appeal and considering cases that were identified as having exceptional circumstances. The varied professional backgrounds of the Trustees and their personal viewpoints ensured that they had a fresh and impartial perspective in considering individual cases. In particular the importance of the Trustees' consideration was invaluable in the development of policy relating to defining independent living for instance, considering when it would be appropriate to allow a close relative living in the same household to provide paid care. During the 27 years of the ILF a total of 35 Trustees committed their time to enabling discretion to be applied to individual cases.

Further to the development of personal budgets in England, different local authorities adopted different levels of restrictions in how direct payments could be used. These localised variations could not easily be accommodated by the ILF as it had a national perspective and had to treat all users equally.

In recognition of the above, prior to the closure of the ILF, Trustees adopted a 'flexible funding' approach to the use of money, which was intended to ease the transition of users to their new support arrangements, by enabling them to put in place immediate provision that would meet their future support needs. This approach, which proved popular with users, could only be realised because the nature of the ILF as a discretionary trust enabled it to rapidly adopt an amendment to the trust deed, without requiring any changes to legislation.

The ILF model demonstrated that discretion, if applied in a consistent and open manner can empower decision makers to provide personalised solutions to meet the needs of the individual. However to do so successfully it is essential that the decision making process is open and clear. The ILF is proud of how it balanced these issues to achieve positive results with individuals always being placed at the heart of the decision making process.

# 18 Value for money

*Delivering efficient and cost effective public services and achieving value for money (VFM) for the taxpayer is of course an appropriate objective for Government. With our responsibilities in this regard in mind, the ILF always sought to keep the costs of its operations to a minimum, recognising that less money spent on administration meant more spend on supporting user outcomes. We recognised, however, that delivering VFM was not just something that involved staff, it was something that our users could also be part of through the recycling of monies adding to the unique relationship the ILF forged with its users*

## *learning point 18*

*‘spend less and achieve more - involve service users in initiatives’*

## Personal reflections from Steve Jarratt, Finance and Resources Director

The ILF needed to not only demonstrate that it provided good value from public funds but also that it wished to minimise as far as possible its administration expenditure, in so that as much as possible of its overall funding went directly to users.

This was achieved through two mechanisms:

- encouraging the user community to support each other by returning unspent monies for recycling - to reduce the call on public funds; and
- keeping a strict control on administration costs - to ensure the maximum of available funding went directly to users.

The establishment of good relationships between users and the ILF caseworkers (which often endured for several years) coupled with high customer satisfaction led to a high level of trust, in turn this enabled users to feel confident about returning any unspent funding (for example in circumstances where a user needed to be in hospital for a time) without a concern of being penalised. Through newsletters, and other communications, users were made aware that cash returned helped fund future payments to those in need of ILF funding and this promoted an attitude of a fair and transparent process that benefited all.

In addition, the completion of a biennial face to face review of every user's support package was undertaken by an independent assessor where all aspects of the user's circumstances were considered; including an audit on how the funding provided had been put to use in achieving independent living outcomes. This process underlined the need to return back to the ILF, on a timely basis, any funds not utilised.

An aspirational target for administration costs of no more than 2% of total funding was set. An absolute limit on administration enabled the organisation to proudly state that 98 pence in every pound was provided to users. Whilst spending just 2% on administration was a tough and challenging target it gave management and staff a clear goal to aim for and this was also a simple internal message to communicate and understand.

Reducing expenditure to 2% required some re-engineering of the organisation which in turn reduced both the estate and staffing by over one third and this was achieved in one single rapid exercise to provide 'front end loaded' savings. Consideration was given to all costs, arranged into delegated budget authorities, with all activities and contracts considered from both internal and external sourcing viewpoints. Various IT process improvements and LEAN initiatives were also introduced and successive years have seen these continuing to keep costs within the 2% limit despite a reduction in the total grants managed by the ILF following its closure to new applications in 2010.

The strategy followed ensured that the ILF delivered value for money and at the same time, positive results for individuals.

# 19 Evaluation

*Being a learning organisation requires a total commitment to ensuring that you genuinely listen to the voice of your customers. It also requires that you challenge your service against external standards, and best practice examples, in order that your perception of 'what good looks like' can be challenged. The ILF took all feedback very seriously and we ensured that we responded to the findings of our user satisfaction surveys and even when the results were strong we were not complacent and acknowledged there was still more that we could do*

## *learning point 19*

*'evaluate the service you deliver and ensure you respond to feedback'*

Personal reflections from Emma Hynd, Head of Customer Services

It is important when customer service excellence has been achieved that this is verified by the customer of the service. The ILF used a customer satisfaction survey as an external quality checking mechanism to establish the customers' experience of the service provided.

Initially questions were based on the core objectives of supporting a user's choice and control:

- has the money from the ILF enabled you to be more independent?
- has money from the ILF enabled you to do more activities?
- has money from the ILF improved your quality of life?
- has money from the ILF given you more choice and control over your care arrangements?

From the introduction of the survey these four questions remained constant and formed an organisational target of achieving 92% user outcome satisfaction. We continually exceeded this target with the ILF reporting 98% satisfaction at the end of our closure programme.

The survey was undertaken following a user's biennial review visit as this was identified as one of the most significant points of interaction between the user and the ILF. Following the decision to close the ILF and undertake a programme of transfer reviews, commitments were made on the service a user could expect to receive. It was important under the new operating environment that the user survey tested whether we delivered on these new promises with questions rewritten directly linked to the transfer review documentation.

Some 26% of all users returned questionnaires which is well in excess of the common return rate for such an exercise. Results demonstrated that the ILF delivered on all elements of service promised. The free text comments also demonstrated the value users placed on the service received by the ILF. These comments were always displayed in the office as many of them were passing on their thanks to staff and assessors for the many years of excellent service received, and so acted as a motivational tool to enable people to remain focussed on the value of the work they were doing.

We also used nationally recognised standards to benchmark our service against and provide a way of challenging us to improve. We were proud to have achieved the Customer Service Excellence (CSE) accreditation for five years in a row meeting full compliance in all 57 criteria.

***“I’ stands for the ‘Incredible’ staff team. I have always been impressed with the staff at the ILF. They are motivated, committed and loyal to the organisation and to the service users. ‘L’ represents the ‘Learning’ organisation that is ILF. Each time I have visited I have found changes and developments, improvements in service and evidence of staff learning and developing and ‘F’ has to reflect the ‘Focus’ on the needs of service users and the way that those needs are put above all else.”***

**Andrew Mackey  
CSE Assessor**

## 20 Plain speaking

*Producing corporate literature in order to communicate an organisation's terms and conditions is not the most exciting of tasks, but taking on board the challenge of conveying difficult and complex information in an accessible but non patronising way actually became a bit of a passion for the ILF. The key was to ensure service user input at a formative stage and maintain this input throughout any design process. Combining this input with in house skills and above all enthusiasm for the task has a real opportunity to deliver positive results*

### *learning point 20*

*'communicate in plain English and ensure accessibility is central to any messages'*



## Personal reflections from Jane Jephson, Head of Communications

With the introduction of a dedicated communications team back in 2005, one of our biggest endeavours was to give our users information in the best format for them, written in a way they could all understand.

Writing in plain English is often seen as ‘dumbing down’, but writing in plain English allows the audience to concentrate on the message instead of being distracted by complicated words and jargon that they might not understand. At the ILF it was even more important that we made sure our communication was easy to understand as well as accessible.

Up until the beginning of 2009 we, as many organisations did, used the typeface ‘Arial’. But the previous year, MENCAP developed a typeface called ‘FS Me’. It was developed with people with a learning disability and was designed to be easy to read. We are very proud that in 2009, we were the first Government organisation to use this new typeface which is now widely used, in Government.

In the same year we also worked to develop our corporate identity. We ended the year with a new design style, a new logo and a new corporate colour. But we didn’t stop there. We also developed our user guides as well as easy-read versions which still carry the plain English crystal mark, the seal of approval for the clarity of the documents.

Over the past few years we developed our approach to other formats, regularly translating letters into different languages as well as being able to produce Braille and spoken word compact disc versions of all our literature and letters in-house. Our design team were constantly looking at new design ideas and different ways we could get important messages out to our users. One of the biggest publications we were proud of was our ‘living’ newsletter which gave our users and their friends and families updates on developments within the ILF as well as success stories and answers to some frequently asked questions.

Our driver was never about how much it cost when it came to communicating with our users; it was always about making sure we deliver the right message, in the right format, at the right time. By ensuring people receive the correct messages our conclusion was that value for money was more than delivered.

***“Letters from the ILF are easy to read and written in a way that I understand. For me it is important that I can read my own letters as it makes me feel independent.”***

***ILF User***

# 21 Portability

*The opportunity to relocate is an important aspect of independent living, and is often associated with transitional points within people's lives, including, moving out of the parental home, accessing higher education and taking up employment. The provision of care and support is necessarily localised, making any relocation a complicated and time consuming process, however, this complexity can be compounded by barriers put in place by the wider social care and welfare system. The ILF approach was to always enable people to take their package of support with them when they moved, making 'portability' a key feature of the organisation's service*

## *learning point 21*

*'services should be flexible enough to 'move' with the individual, acknowledging that life is not static'*

Personal reflections from Keith Turner, Policy Development Manager

For many disabled people the barriers to relocation are substantial as not only do they need to find suitable accommodation, but also may have to deal with a number of different agencies, recruit suitable care providers and establish sustainable support networks. These additional complications may deter or limit people's opportunities to live full and inclusive lives and as such organisations need to consider how best to remove barriers and support users.

As a national organisation the ILF recognised the importance of ensuring that support was portable.

Standardised eligibility criteria and assessment procedures meant that the ILF could maintain payments (where required) throughout the period that a user wished to relocate, providing them with an element of continuity. In addition the ILF could respond rapidly to any change in circumstances, having a record of the user's circumstances and knowledgeable local assessors throughout the country.

Following a user's relocation the ILF visited and reassessed their package to determine if the new arrangements had impacted on the care and support requirements, for instance whether the new accommodation was more or less accessible and whether the cost of care different. In many circumstances the loss of unpaid care and social support networks impacted upon the overall support needs. ILF policy was therefore flexible around this area allowing for rapid adjustments to payments. In addition the ILF 93 Fund requirement that the local authority maintain a threshold sum ensured early engagement from the new local authority.

Local authorities in contrast often needed to reassess the user's financial circumstances, as well as their eligibility and support needs, with the accompanying delays in setting up the new support package and no guarantee what the support package would look like.

The Care Act in England goes a long way to addressing the issues around portability within social care; it ensures that support can continue at the same level until a full assessment has been completed by the new local authority, it lays down a minimum national eligibility threshold and it gives users the choice in how the provision will be met.

These changes are to be welcomed and were hopefully influenced in some part by the ILF model. However, it remains uncertain to what extent local variations will remain and the extent to which agencies can coordinate responses to ensure that barriers and delays are minimised.

# 22

## Managing public monies

*The reality of delivering cash payments to individuals over 27 years was that there was inevitably a number of payments that were fraudulently claimed. However, our approach to delivering a truly person-centred service meant that such incidents were kept to a minimum. In order to adhere to our responsibilities for managing public monies we needed to have robust processes in place that could take action when required but we also always sought to balance with this the need to handle situations sensitively, with the overall focus being on ensuring individual's safeguarding needs were at the forefront of our decision making*

### *learning point 22*

*'ensure robust procedures are in place to protect public money and safeguard individuals'*

Personal reflections from Rachel Myers, Head of Payment Security and Liz Coleman, Payment Security Manager

The ILF was committed to protecting the public funds with which it had been entrusted. Minimising the losses to fraud and error was an essential part of ensuring that ILF monies were used for the purpose for which they were intended.

The ILF payment security team developed a framework which linked fraud, compliance, debt recovery and audit procedures to track and confirm the appropriate expenditure of our funds. By ensuring payment security principles were clear, robust and notified to all users or their representatives, a culture was promoted where detected fraudulent or criminal activity was kept to a minimum and ran well below the national average of 0.7% reported by the Central Civil Service in the financial year 2013/14.

The strategy had to be developed in such a way that it would be clear and identifiable to our customer base. ILF Fund users were, in the majority, in receipt of the highest level of Disability Living Allowance. This meant that we had to take into account not only the information that was provided to our users but also its format. We tailored our policies, procedures, information and communications to our user base to ensure our requirements could be clearly understood and implemented. We ensured there were processes in place to safeguard those users who were unable to manage funding themselves whilst, ensuring they still had choice and control over the care they received.

The main barrier faced by the organisation regarding completion of investigations was that whilst we were inextricably linked to DWP, we experienced none of the powers granted to them as 'authorised officers' when it came to conducting investigations. To overcome this we nurtured links with key stakeholders within the fraud investigation service, local authorities audit and the police.

The purpose of this framework was to ensure a higher probability of successful conviction in criminal proceedings, limit the loss to the ILF through error, and ensure any funds which were lost could be efficiently recovered in order to be recycled back into our funding stream.

Through the adoption of this strategy we were able to safeguard vulnerable people and to protect their funding in order to contribute to the ILF's core beliefs of enabling disabled people to live independently whilst ensuring that the ILF had the ability to provide an audit trail of expenditure and limit loss to the public purse through fraud and error.

## 23 UK consistency

*Delivering a consistent service that is flexible to local requirements appears somewhat contradictory as a central aim. The ILF ensured that its core framework of policies and processes was consistently applied across the UK, which enabled portability of support for those moving from area to area and, indeed, country to country. This framework however was responsive to local needs and through a regional structure, operating within national policy, teams were able to develop strong relationships with local authorities enabling processes to be partially adapted to respond flexibly to local ways of working. This created a consistent service for users that was able to maximise local efficiencies*

### *learning point 23*

*'services should be delivered consistently regardless of postcode yet be responsive at a local level'*

Personal reflections from Maria Fletcher, Social Work Team Support Manager and Wayne Edwards, Regional Manager

The ILF provided support to disabled people across the UK following national eligibility criteria bound within the organisation's Trust Deed and Conditions of Grant Agreement.

In the early days the Fund was split operationally into two funds named the Extension and 93 Fund under two different sets of criteria. The main criteria difference being that Extension Fund users had no local authority input and 93 Fund users required a threshold sum contribution from the local authority. Teams at the time worked on alphabetical case splits covering the whole of the UK which meant that users received the same level of service regardless of where they lived.

Following a change to the Trust Deed in 2006 the service delivery teams, who managed the user cases were reorganised into regional teams to drive efficiencies in our operation. More effective working relationships were developed with local authorities as a result of this change. In some of these authorities the lead contacts or specific teams were created that had responsibility for any applicants to the ILF in their area. Specific regional knowledge was also developed and retained within the team by our caseworkers. Our service, however, remained bound by the same set of eligibility criteria regardless of where this was being delivered.

User offer and award assessments were completed, working within the remit of specific policies that considered an individual's support needs but also supported a consistent approach to financial calculations. Caseworkers were trained to the same level to ensure a high level of customer service was provided to all correspondence/queries.

An in house IT system was developed that supported the assessment process considering both policy and individual financial circumstances and eligibility criteria. Caseworkers used this to calculate offers of funding for users across the whole of the UK.

A set of universal forms was also created to obtain accurate financial information from both local authorities and users to support the assessment process.

A comprehensive guide was provided to all users with key information points regarding eligibility criteria, changes to individuals' circumstances and how the funding could be used to meet their needs.

Despite the changes made to the operational structure over the lifetime of the Fund a consistent approach across all regions was maintained. It was hopefully apparent that no matter where the user resided within the UK they received a high level of customer service.

# 24 Governance

*The ILF corporate governance systems were drawn from central Government good practice guidance and were strengthened and refreshed through legislation, process reforms, compliance activities and through several years of collaborative working with our stakeholders including internal and external auditors.*

*Good corporate governance in the public sector should be rigorous and robust but also sufficiently agile and progressive to accommodate change. At its core, corporate governance has to ensure that the business environment is fair and transparent and that organisations are responsible for their actions and held to account*

## *learning point 24*

*‘a sound and robust governance structure is essential to enable an organisation to have the freedom to deliver’*



Personal reflections from Roland Knell, Head of Information and Governance

The ILF was governed by a system of rules, processes and practices which flowed directly from three core documents drafted and approved by Government Ministers, these documents consisted of; a Trust Deed; a Conditions of Grant Agreement (COGA) and a Management Statement.

These documents provided the framework to deliver the service required and balance the interests of the Government, key stakeholders, customers, suppliers and an operating model incorporating the necessary and appropriate legislative and policy requirements.

The ILF's effective corporate governance went beyond simply establishing a clear relationship between the Government and key stakeholders, over 27 years it enabled the ILF to have strong standards for operations, customer services and corporate delivery balanced with our core values of fairness, transparency, responsibility and accountability.

The governance structure of the ILF was headed by the Minister of State for Disabled People who was accountable to Parliament for performance; he/she appointed a board of Trustees, who exercised powers and duties under the core framework documents, approved policies and legislative underpinning.

The board of Trustees had a responsibility for maintaining sound systems of control to address key financial and other risks, that high standards of corporate governance were demonstrated and maintained, and for reviewing the effectiveness of the systems of internal control.

The ILF Chief Executive was formally nominated as the Accounting Officer for the organisation and as the Consolidation Officer for the purpose of Whole of Government Accounts. Their responsibilities were set out in the Trust Deed and Management Statement. The Chief Executive led a small multi-skilled Senior Management Team, under a scheme of delegated authority approved by Trustees.

The ILF risk management framework set out the organisation's attitude to risk, our overall risk appetite or attitude was that we were 'risk averse'. This did not mean that we avoided opportunities to improve and modernise, however, it did mean that we were rightly cautious when changes may have hindered or put at risk our core business and service provision to our users.

Where risks were flagged for discussion at Trustees Board, Audit Committee, at Senior Management Board or a Risk and Controls Board we appointed a specific manager with a defined responsibility to ensure that the risk was managed and reported from the most effective position within the ILF.

Our risk management processes enabled us to identify our risks at an early stage, and as a more compact business unit were able to bring our agility in both process design and solutions management to bear on any problems with rapidity. Risk management processes were embedded into all levels of our business and were a robust and active source of information and assurance for the ILF.

As an executive non-departmental public body of DWP, our risk strategy and performance was reported to the DWP and we provided information and assurance that our processes remained compliant with DWP and Cabinet Office mandated requirements.

We were proud of the acknowledgements we received from auditors and Government officials regarding the strength of our approach in this area.

# 25 Looking outwards

*Delivering an effective service requires people who are able to look beyond the computer systems and paper files which whilst they form the essential tools of an administrative environment can also create barriers to the outside world. Looking outwards, beyond the walls of the organisation and enabling staff to have collective and individual experiences gave them an holistic and more rounded perspective which was key to maintaining a service focussed on the service user, and their lived experience*

## *learning point 25*

‘successful organisations look beyond their own walls and interact with the communities within which they exist’

Personal reflections from Amanda Kennedy, Learning and Development Business Partner

The ILF was always committed to 'looking outwards'; ensuring that we built effective partnerships that added value to our work and supported others. Employees were always encouraged to 'see the bigger picture' as an integral part of our performance management process.

A contributory factor to our success was a learning and development policy promoting self directed development, variety and community engagement. Good news stories were celebrated through intranet blogs, learning at work events and newsletters, encouraging more colleagues to engage with 'looking outward' activities.

A 'One Day Customer Focus' activity enabled employees to take a day out of the office, initially volunteering with a disability related organisation. Employees visited organisations including Portland College, Inspire, Mencap and Acorn where they participated in activities with students and members. The collaborative relationships built resulted in further engagement, for example, Portland college students visited the ILF to fundraise, selling goods they had made in their enterprise workshops.

These activities enabled employees to gain new perspective and see for themselves the challenges that ILF users faced in their daily lives. As a result staff returned to their desks with a new appreciation of the valuable role they played in supporting users.

The scope of the 'One Day' activity was broadened in 2014 to include any volunteer activity that added value and developed the individual's skills, promoted as part of the wider civil service '5 A Year' personal development programme. Employees were able to develop skills including coaching and mentoring as well as building confidence and motivation as individuals by seeing the difference they made by supporting others in the community.

As an organisation that was relatively 'isolated' in terms of location, networking enabled us to engage with other departments and make employees feel more a part of the wider Civil Service. By supporting the civil service local group and a local learning and development network we were able to increase the range of volunteering, job shadow and secondment opportunities available.

Two employees were also seconded to civil service local, enabling them to gain valuable insights as well as develop new skills. As part of the secondment experience, one secondee followed her passion for volunteering. This has resulted in the sourcing of a greater variety of volunteer opportunities available to civil servants in the East Midlands. Additionally visits were undertaken to different local offices to promote the benefits of volunteering and community engagement.

We also worked in partnership with another local arms length body to deliver a programme entitled 'Engaging our schools' that sought to give young people an insight into the world of work.

Sharing learning with colleagues has been important and intranet blogs have informed colleagues about the secondment role and the benefits.

Through the ILF commitment to looking outwards we achieved greater employee engagement, developed employee skills and gave something back to the community that we live and work in. Employees have experienced unique learning opportunities that would not have been possible within the office.

## 26 Equality impact

*To achieve equality requires a commitment to challenge the approach taken by an organisation in all aspects of its service. But challenging alone does not take things far enough. The ILF not only challenged itself, but repeated the challenge over and over again to confirm that its approach was as good as it could be. This included bringing people together with specific expertise, testing ideas out with service users and using national standards to benchmark our position. To achieve equality requires this process to be fully integrated into core activity*

### *learning point 26*

*‘Services should be assessed with regard to equality, and the lived experience of individuals should form part of the challenge process’*

Personal reflections from Wendy Donegan, Customer Service Manager

The Public Sector Equality Duty (PSED) requires all public bodies to have due regard to equality when carrying out its functions. As a public body, under this duty, we had a legal responsibility to give due regard to: -

- eliminating unlawful discrimination, harassment and victimisation and other conduct prohibited by the Act;
- advancing equality of opportunity between people who share a protected characteristic and those who do not; and
- fostering good relations between people who share a protected characteristic and those who do not.

We formed an Equality Impact Assessment Board (EIAB) in April 2010 to oversee, assure and monitor the ILF Equality Impact Assessment (EIA) process. An EIA involves assessing the likely or actual effects of policies and/or procedures on people in respect of the nine protected characteristics stated in the Equality Act 2010. The ILF had a particular interest in ensuring that we met the PSED as all of our users fall within one or more of the protected groups.

The ILF was committed to equality for all of our users and staff and consideration to the impact that a policy and/or procedure had on all parties underpinned the decisions we made. The composition of the EIAB provided a wealth of knowledge and included service users to ensure that we took into consideration the views of people affected by our policies.

As the EIAB evolved we updated and improved how we completed an EIA. Our EIAs were comprehensive and concise and demonstrated that we took our commitment to equality seriously. All of the EIAs were published alongside our policies, as we demonstrated openness and transparency in our decision-making processes. Staff were also required to undertake equality and diversity refresher training every two years.

Our commitment to equality was further evidenced by our retention of the 'Committed2Equality' gold standard; a nationally recognised accreditation, as well as the double tick 'positive about disabled people' accreditation. Our Single Equality Scheme consisted of a number of action points to ensure our compliance with equality legislation; raise standards in service delivery; strengthen communications and engagement with our customers; ensure fairness and consistency in the development and implementation of our policies and processes; and ensure that we were a good and fair employer.

# 27

## Imparting knowledge

*Over the past few years, during many discussions regarding the closure of the ILF, users, stakeholders and partners raised the same concern – that regardless of outcome, the knowledge accumulated by the organisation over the past 27 years needed to be captured in order to be used to inform future independent living services for people with high support needs. We hope that this publication, and the many activities and discussions we have engaged in during the closure programme responded well to this call*

### *learning point 27*

‘Share knowledge to support others towards the common goal of delivering high quality services’

Personal reflections from James Sanderson, Chief Executive

Alongside the many external calls to ensure that the knowledge of the organisation was captured during the closure programme it was also an extremely important objective for Trustees and the ILF Executive team. We recognised very early on that when any organisation closes there is a consequential loss of experience and intellectual capital from the system that has taken many years to develop and refine.

The ILF played a unique and pioneering role; in the development of a 'cash for care' model; in the delivery of person-centred planning; in developing services founded on the concept of choice and control; and in the achievement of a national standard for independent living support.

Whilst never wanting to suggest that the 'ILF way' of delivering services was the best or only way, we were very proud of what we achieved throughout the 27 years, and believed that our knowledge had value beyond the life of the organisation.

With this in mind, in January 2013, as part of our closure programme we launched an internal project called MICK or Making Intellectual Capital Known. The project aimed to review the key areas of the ILF service that had contributed to the successes of the ILF and therefore the areas that would be the most valuable to share with others pursuing the same goals as the organisation.

In order to capture our learning, and additionally provide staff at all levels with the opportunity to contribute to the task, we took over a large wall in the office on which we created a giant ILF timeline - mapping the ILF history from early foundations right up to the present day.

Staff contributed their personal and professional memories to this wall, to bring the history alive, and in many ways the task of capturing our learning also served as a cathartic experience for people as they came to terms with the closure announcement.

The material gathered was then reviewed, reworked and debated, in order to come up with a definitive set of learning points that we felt captured the 'essence of the ILF'. The things that made the organisation what it was.

We also set about archiving all of our corporate memory - the papers and documents that had formed the basis of the organisation's corporate governance structure since inception; in order that this could be preserved as part of the National Archives for anyone wanting to undertake academic research in the future.

Twenty-seven is a summary of our knowledge and learning - a explanation of how the ILF achieved what it did. It does not seek to be comprehensive, neither is it a piece of academic research, it is the story of the organisation and our experiences. Our hope is that the material contained in this document can be of some use to those involved with independent living support.

Furthermore, we hope that the achievements of the ILF create a legacy beyond organisational existence; one that adds true value and leverage to the system, and provides a model of best practice that future independent living services for disabled people can hopefully improve upon.

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