Good Practice Guide

Providing Community Equipment

Contents

Introduction

The purpose of this Guide is to support local Community equipment services to effectively develop, deliver, manage, and monitor the provision of a wide range of equipment, from the point of assessment through to delivery, and the conclusion of the assessment process. This sits within the framework of the overarching *National Guidance on the Provision of Equipment and Adaptations (2022),* and focuses primarily on the provision of community equipment.

This guide was originally developed for the previous national Guidance (2009) and was published in 2010 as an accompanying good practice tool. This version has been amended and updated to reflect the integration arrangements across Health & Social Care and other relevant policy and good practice developments, and to compliment and support the use of the new Equipment & Adaptations baseline assessment tool, which has been developed as a tool to help partnerships evaluate their performance in relation to the updated national Guidance, and improve service provision.

This Guide is in a 'checklist' format, and identifies detailed components which should apply to all effective and efficient equipment services. This provides the detail which underpins the *Key Actions* detailed in the main Guidance. By utilising the checklist, this should assist partnerships in the application of a consistent, standardised, and systematic approach to service development and delivery across all areas of Scotland.

Over the years, a number of partnerships have utilised the original tool to help them review and develop their service. In some cases this has helped gain greater strategic ownership, and identify additional funding and resources, and others have used this as a way to evaluate and benchmark their service as part of general service improvement.

However, there is a need for all services to review their models, as it is clear that there are still fundamental issues with some of the store service arrangements which are continuing to present problems in the service pathways e.g. particularly in relation to funding and finance models which are not properly integrated to deliver seamless pathways, and result in delays to the provision of equipment for those who need it most.

- We are recommending that all partnerships should utilise this Guide to assist them to review their current community equipment service(s), and to complete the new evaluation Equipment & Adaptations baseline assessment tool.

Service Model

It is recognised that development in equipment services differs across the country. A range of models have evolved with examples ranging from jointly funded store and multi-profession/multi-agency equipment provision, to single service models with local arrangements around access to more limited equipment.

Health and Social care Partnerships (HSCP's), and their corresponding NHS Board areas, are being encouraged by the Scottish Government to comprehensively review their current models of provision based on the key themes and principles highlighted in the relaunched National Guidance. It is acknowledged that the scale and type of models adopted may continue to vary to reflect local arrangements. However the key areas identified in the checklist below should be evident in the principles and focus of the service model provided, and should wherever possible ensure that pathways are developed to encourage the streamlined provision of a wide range of equipment for children and adults of all ages, and ensure the appropriate involvement of all relevant partners including, Education, Housing, Prisons, and third sector:

Checklist 1: Community Equipment Partnership Service Model

Outcomes focus

In all relevant documentation for the service (including training materials) there should be a clear measurable statement describing an outcome focus to the service provision. This should refer to the relevant Outcomes requirements and highlight the following themes and considerations:
- What will the provision of equipment achieve?
- Is this linked to wider health, & social care service targets, and reflect all needs?
- What do service users want to be able to do that the equipment provision will support?
- How will you know you are getting the service right?

Rehabilitation perspective

In all relevant documentation for the service (including training materials) there should be a clear statement describing the context of the provision of the equipment service in terms of wider rehabilitative service provision:
- How does the equipment service contribute to local and national strategies in relation to rehabilitation?
- Is there a clear message of minimising intervention, to maximise independence? This should describe the aim of equipment provision as being a means to support rehabilitation and avoiding over prescription.

Strategic goals

Key strategic goals should be set which give all stakeholders a 'clarity of purpose' in the service:
- What are these goals?
- How will the service achieve these goals?

Service pathways

The service model should be developed and reviewed on the basis of the effectiveness of <u>service pathways across all care groups and service areas within Health & Social Care, and relevant partner services</u>:
- Which services and staff (e.g. involved in front line assessment) need to be able to provide equipment via the equipment service? ……consideration requires to be given to all health, and social care services, likely to need to provide equipment to achieve outcomes for their service users. This should include a wide range of services and professions, and extend beyond the more traditional older people/Physical disability provision e.g. Homelessness, Addictions, Mental Health, Sensory Impairment, and Learning Disability as well as Children's services, Education, Housing and prisons. This list is not exhaustive, and partners should be encouraged to think widely about all relevant partners.
- What arrangements need to be in place to make this happen?
- What are the pathways to and from the community equipment service to other elements of specialist equipment provision such as wheelchair provision* and Technology enabled care? *Partners will be expected to be complaint with the statutory Guidance published in March 2021 directing them on the provision of standard wheelchairs for short-term loan.

Direct Access

The service model should provide opportunities for direct access and self-assessment by service users:
- How is this built into the pathways in order to support early intervention, prevention and self-management?
- What tools and models are being utilised to support people to be able to independently self-assess and identify solutions for themselves?

Governance

The service requires to clearly identify responsibility in the management and governance of the service. This is essential for all stakeholders and will assist in communication, with service users and their carers, as well as internally across the relevant agencies from frontline staff, to senior strategic managers.

Checklist 2: Governance

Strategic framework

The service should map the strategic framework for the service and ensure it reflects all agencies and partners input:
- What are the groups/forums that are responsible for the development, implementation and monitoring of the service?
- Who are the members of these groups?
- Are there gaps/are key stakeholders missing?

Workplan/Annual reports

There should be a Workplan which details key objectives and tasks to ensure effective delivery of all aspects of the service (operational – the Store service) as well as the strategic aspect of the service (Protocols, Partnership arrangements, training…). This should be reported against quarterly and reviewed annually. This is particularly important where new arrangements are being developed and implemented. Where partnerships are able to evidence well-established, mature and effective multi-agency working arrangements, the Workplan may take the format of an annual report.
- Who is responsible for the development and implementation of the Workplan and/or annual reporting?
- Which Group/forum agrees and reviews the Workplan and/or annual reports?

Operational & strategic roles

The partnership should identify which managers are responsible for the different aspects of the service and have robust arrangements in place which ensure that responsibility for the delivery of the service are clearly delineated e.g. those managing the delivery of the Store service are defined as 'service provider' roles. Strategy and policy, and infrastructure to support the effective governance of the service, should be clearly separate out as the responsibility of the partners, as the 'commissioners' of the service.
- Which managers across the health, & social care services have overall strategic responsibility as 'commissioners' for the effective delivery of the equipment service?
- Do these managers meet frequently at an agreed forum?
- Are the roles of the Store service management clearly separated out and defined as those of 'service provider'?
- Do locality managers clearly understand their operational responsibility for managing the staff who assess and provide equipment?
- What are the roles and responsibilities of all these managers and how are they involved in decision making?
- How are front-line staff involved in the development of the service e.g. development of Protocols, review of equipment, training development and delivery? – is this ad-hoc or via structured groups?

Partnership Arrangements

In line with the updated National Guidance on Equipment and Adaptations, equipment services should review current models of service delivery and identify where <u>added value</u> could be provided from an integrated approach, with all relevant partners/agencies, and/or further development of existing integrated models. Where formal integrated Partnership models exist, these should have a Partnership Agreement which provides supporting documentation outlining the financial and legal commitment to the arrangements, monitoring and accountability, as well as formulating a clear message as to why the agencies are in Partnership and the expected benefits this will bring.

Checklist 3: Partnership arrangements Checklist

Partnership arrangements
The service should develop a Partnership Agreement document which can be used to support all aspects of the arrangements. This will define: ▪ Who are the Partners? ▪ The relationship to the Store service provider? ▪ What are the legal responsibilities of the Partners? ▪ What are the financial responsibilities of the Partners? ▪ How are decisions made and who is accountable? ▪ How, and what resources are committed?

Finance

The National Guidance has previously identified the need for health & social care partners (including other relevant partners such as Housing, and Education), to identify all spending on equipment across their services, supporting the integration of funding arrangements, and the creation of jointly funded equipment services.

Unfortunately there has not been enough done to address key issues, in particular, anomalies within the funding arrangements for some Community Equipment services, which manifests itself in Store service arrangements which have different funding streams for the procurement of different types of equipment, creating barriers and delays in the service pathways. It is essential that all community equipment, irrespective of type, is procured in a homogenous way, with Store services having one integrated funding pot for the procurement of all new equipment. Financial processes and systems should then allow for the retrieval of costs from partners, based on the consumption of actual service use (activity and equipment) and not on the type.

This has been reinforced in the updated Guidance to ensure partners apply the requirements of the Integration arrangements, and reflect these in finance models which allow the seamless provision of equipment by a wide range of staff and agencies.

Checklist 4a: Finance

Funding arrangements for Community equipment Store services and Budgets for equipment provision

Funding arrangements should be agreed jointly across the services and budgets set up in way that support direct access to equipment in line with the service pathways. The funding should provide for all parts of the service delivery including all Store service costs (lease, running, maintenance, staffing, transportation, procurement, Health & Safety…) as well as Training & communication costs, and any additional project resources including personnel (see Part 4 (B) below):

- Are the agreed financial arrangements written down and signed off by all Partners (see Partnership Agreement Part 3)
- Are the running costs for Stores services jointly shared across relevant Partners?
- Are these costs shared, based on activity or on an agreed model which is transparent, in terms of individual partner usage?
- Does the Store service have funding arrangements which allow them to procure all types of equipment from one funding source? e.g. partners should have costs for equipment funded upfront with resources pooled and no separate arrangements to fund the procurement of equipment according to type/agency.
- Are equipment & service costs charged at point of use? e.g. are services paying for equipment based on who assesses and orders (or on historical professional arrangements)?
- Are adequate resources provided for Training/Communication?
- Are there agreed funding arrangements for any joint posts required to support the service?

Monitoring

Monitoring mechanisms and structures should be set in place, which ensure full ownership and accountability in relation to equipment expenditure, across all services. These arrangements should provide a framework for the annual (and ongoing) review of budget requirements:

- Is there a dedicated Finance Group for the equipment service?
- Are there named officers who have overall responsibility for financial arrangements?
- Are there robust arrangements for the ongoing review of budget requirements and clear timescales around forward planning for annual budget setting?

Reporting

Financial reporting should be frequent and detailed. The frequency should be agreed locally and fit with other reporting cycles e.g. 4 weekly.

- Are financial reports submitted to the overarching group of strategic managers for monitoring?
- Are local operational line managers provided with the financial reports?
- Are trend reports provided and actively analysed to support future funding and alert to pressures?

Spending against equipment should be easily identified against locality service (geographical) care groups (e.g. Older People, Children, Learning Disability, Mental health….) and managers within these services require to be fully accountable for the equipment selected by their staff irrespective of whether they hold the budget.

- Do the financial reports breakdown spend against each care group within locality services?
- Are managers within these services actively managing expenditure (including authorising orders)?

Resources

For the service to be as effective as possible it is important that consideration is given to the personnel resources which are required to deliver all aspects of the service. In many current models there are managers who have more than one role e.g. manage Store service, professional lead, and strategic lead. This type of arrangement has the potential to create scenarios where there may be a conflict of interest, and certainly challenge the ability for robust independent governance. It is essential that roles are separated out, and that recognition is given to the level of independent strategic resource required to effectively develop and deliver, and support integrated partnership arrangements. Dependent on the scale of (particularly joint service) models, there may also be the need for additional staff to be employed to provide support in relation to key workplan tasks e.g. Protocols, Training, communication, IT system development, service user and carer involvement. In integrated Partnership arrangements the funding of posts should be equally shared across all Partners.

Checklist 4b – Resources

Lead personnel

Personnel requirements should be clearly defined against service delivery and Workplan tasks.

- Are the different roles clearly defined and communicated? e.g. Store manager (working on behalf of the Store service provider), strategic partnership manager (working on behalf of all the partners)
- Are the key tasks required by the partnership project role(s) quantified and reported against?
- Are adequate resources to meet agreed Workplan tasks in place? E.g. training
- Are joint funding arrangements in place?

Communication

A communication strategy is a vital device in making sure that all stakeholders within the agencies are effectively involved in the equipment service. A range of mechanisms should be considered that recognise the needs of individual service areas and professions as well as provide joint forums for the sharing of expertise and the development of relationships that effectively support joint working.

Checklist 5 – Communication Checklist

Stakeholders
All stakeholders should be clearly mapped out across all agencies: ▪ Which managers need to be communicated with? ▪ Which staff need to be communicated with? ▪ What information should be provided e.g. Financial, performance, training, protocols?

Key mechanisms & lead responsibilities
Key mechanisms should be agreed by the strategic management for the service: ▪ What groups require to be set up? e.g. specific forum for inter-agency, cross - professional leads to monitor the Store service; high-level strategic forum for overall governance; forums with front-line and professional reps to review equipment and inform practice etc…. ▪ What other groups/forums should be reported to out with the community equipment service governance arrangements? ▪ What other mechanisms should be used e.g. newsletters, website, and annual events? ▪ What should be the agreed frequency of communication arrangements?

Service User and Carer involvement

It is essential that a range of mechanisms and approaches are considered to ensure service users and carers views are helping develop and review the provision of equipment services. Existing forums and mechanisms for gathering service user and carer feedback will help inform services on the outcomes required from service users and their carers, however other mechanisms should also be employed to ensure the most effective contribution to service development and evaluation.

Checklist six: Service user and carer involvement

Key mechanisms

A range of different mechanisms should be considered. These need to gather information both with regard to operational service responses but more importantly about the benefit the provision of the equipment has provided:

- Are there existing Service forums that can be used which already involve service users and carers e.g. forums established under the health and social care partnership arrangements, via housing, third sector agencies?
- Do new forums require to be established?
- Are there regular surveys used to gauge service user and unpaid carers views e.g. Annual, bi-annual?
- Do the questions asked, clarify the difference the provision of the equipment has made e.g. what can someone now do? Do they feel safer/more independent? Has it stopped a hospital admission...?
- Are service users and carers involved in the provision of training on assessing for equipment? e.g. either in person, or by use of their stories and experiences?
- Are different mechanisms considered to give service users and carers a voice e.g. use of digital stories?

Assessment and provision of equipment

Good assessment practice is fundamental to the provision of an effective equipment service. This should be in the context of promoting independence, and should balance risk with the need to maximise functional potential and avoid over-prescription. The pathways need to reflect the need to help people to help themselves, without the need to draw them into the services. The updated Guidance highlights the need to ensure prevention, early-intervention, and self-management options are all built into early service responses, and throughout the pathways, including between hospital and community, and across all relevant community services and partners.

Equipment can complement a range of needs and interventions including rehabilitation and the management of conditions, and should be viewed as integral to the delivery of wider service objectives which aim to maximise people's independence and ability to self-manage their own conditions wherever possible.

Assessment and provision of equipment should be recognised as the responsibility of all care groups and services, as a means of supporting overall service delivery. Staff should therefore not be viewed as 'orderers of equipment', but as assessing and providing equipment to compliment other service provision/their interventions and/or supporting wider service goals e.g. preventing admission or facilitating hospital discharge. Full training requires to be provided to ensure competency for all staff assessing and providing equipment (see Chapter 11: Training).

Service users and their unpaid carers require to be fully involved in the assessment process and it is essential that there is an outcomes focus to the assessment with clear goals identified, agreed, and recorded, with the provision of the equipment seen as an 'input' ('means to an end') rather than being considered an 'outcome' ('end in itself'). The principal of 'minimum intervention, maximum independence' should underpin every assessment. Alternative methods of managing should have been tried and found not to be successful and preference alone should in no way influence the type of provision. This includes circumstances where equipment is being used by paid carers, and opportunities to provide equipment which may support single-handed care should be explored as part of the assessment process.

Checklist 7 – Assessment and provision of equipment Checklist

Protocols
A Protocol should be in place which provides a joint inter-agency agreement defining the arrangements between the relevant agencies/partners in terms of the roles and responsibilities of staff and their managers, and the processes across the service pathways for assessment, prescription, and provision of equipment: ▪ Is there a Protocol (s) in place which clearly advises of roles and responsibilities across the agencies, for the assessment and ordering of equipment? ▪ Is this effectively applied and is there ownership of this across the agencies? ▪ Is this effectively communicated via training/briefings as required? ▪ Are these arrangements reviewed, developed, monitored and implemented? ▪ Is it clear which forum/group of managers/manager; has lead responsibility for these arrangements?

Roles and responsibilities

Via the Protocol arrangements, staff within hospital and community care group services (including physiotherapists, nurses, occupational therapists, and social worker staff) should be able (following appropriate training) to access a wide range of equipment relevant to the type of service they are providing, and not based on professional or agency boundaries. Other professions are not precluded from this access and consideration should be given to inclusion of relevant staff within the different service settings e.g. including social worker support staff, rehab workers.

These arrangements should ensure that staff can assess for and order equipment directly, without having to refer on to a separate agency or professional group to order on their behalf.

Staff who assess and order equipment are responsible for demonstrating the correct use of the equipment and satisfying themselves as part of the assessment process that the equipment meets the assessed needs, and the service user is safe in its use. Only at this stage can the full assessment process be concluded. If there are any concerns then the member of staff should not provide the equipment, and if necessary remove it from the home (or arrange uplift) and will record in their relevant paperwork the reasons for this.

Where staff require to provide equipment that will be used by paid carers (e.g. moving and handling equipment - hoists, Stedys, crickets..), then the member of staff will only do so following a full assessment of need which encompasses risk assessment. If, having carried out their assessment, they feel it is appropriate and safe to provide the equipment e.g. there are no unacceptable risks related to the promotion of the independence of the service user, the physical home environment, lifestyle within the home, cognitive/physical issues of the carers etc, then it is the responsibility of the assessor to demonstrate the equipment and ensure the people using the equipment are safe in it's use. If there are concerns highlighted by the process above, then the member of staff should not provide the equipment and record in their notes their reasons for doing so.

Individual agencies have different arrangements in the provision of support for unpaid carers. Staff should sign post unpaid carers to their local carers' services to establish if additional support is available to them. This may include training on generic Moving & Handling which would support them to build knowledge, understanding and confidence in all aspects of moving and handling.

- Do the Protocol arrangements clearly define which staff/services have direct access to the assessment and ordering of equipment ensuring the widest possible access?
- Are these roles and responsibilities clearly explained?
    o Assessing role and responsibilities
    o Selection and ordering of equipment
    o Follow through, demonstration, and conclusion of the assessment process
- Are the principles of minimum intervention, maximising independence clearly applied in all aspects of the service pathways, and over-prescription of equipment and service provision avoided?

Standard and specialist provision

Provision of equipment differentiates between meeting needs which may range from very simple, through more general non-complex needs, to more complex needs where specific professions are more likely to be involved (under the umbrella of 'Standard provision'), and where a specialist assessment is required to meet highly complex and specialist needs ('Specialist provision'). See *Appendix 1* 'model for the provision of community equipment'

- Supported by effective training, and through good assessment practice and by evidencing their reasoning, front-line assessing staff will be able to establish what the risks are around the provision, and consider their own competence to meet these needs.

It is expected that the majority of provision can be met directly by trained staff (see Part 11) who originally identify the equipment needs, however if the member of staff does not feel competent due to the complexity of needs falling within another professions expertise, they will refer to that service for an assessment. The referral should not prejudge what the outcome of that may be e.g. this should not be a 'prescriptive referral' for a certain type of equipment, but identify the needs that require to be met (the logic being that if a member of staff can accurately assess the type of equipment required then they should not have to be referring to another agency to order on their behalf).

- Does the service allow access to most types of equipment by staff who can access the equipment service? Are there very few exceptions?
- Has the service fully explored the opportunities to provide wider access to different types of equipment, and also to different professions/staff?

Professional support

Arrangements for professional support and advice need to be clearly signposted within the service and compliment the training and competency arrangements.

- What arrangements are in place for professional advice?
- Are all services/partners clear about these?

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Store Service

The operational Store service should sit within the overall equipment service model, and compliment the delivery of the wider objectives e.g. it is essential that the 'equipment service' is not solely viewed as the 'Store service' as this fails to acknowledge the significance of the wider model in terms of bringing staff and services together in a cohesive approach to streamlining equipment provision within service pathways. This will be relevant whether the model encompasses many or few agencies/partners in its provision.

A comprehensive Store service operation is pivotal in delivering an effective and efficient equipment service. Without this, it will hinder joint working and Partnership development. The operational responsibilities of the Store service should be clearly defined and it should be operating within business parameters, with set standards and a service level agreement.

Premises should be fit for purpose with effective use of technology to maximise efficiencies in the procurement, storage, repair, maintenance, ordering, and delivery of equipment. The service should be able to evidence that it is maximising its ability to retrieve and recycle equipment and report against savings and efficiencies made. Clear procedures require to be in place for the decontamination of equipment, and the service should be ensuring adherence to health and safety requirements in relation to the checking of all mechanical lifting, and electrical equipment. It is acknowledged that the model needs to be flexible e.g. not all services will be able to achieve all of the above within one premise. Services need to consider how best they can access and deliver against these requirements.

Checklist 8: Store Service

Service level agreement

The Service Level Agreement should detail the scope of the operational Store service (service specification), the objectives, and agreed service standards and provide a framework for performance monitoring:
- Do you have a Service Level Agreement?
- Is there a service specification and set standards? e.g. time from request to delivery…
- Is there an agreed timescale for the review of the SLA arrangements?
- Is the Store service monitored as part of wider performance monitoring?

Role and core functions

The role and core functions of the Store service should be detailed in the service specification contained within the SLA. These should differentiate between what the partner agencies require to do, and what the Store staff have responsibility for e.g. in some services Store staff may also demonstrate the correct use of the equipment, in other services this must be done by the member of staff who assessed. In most services it will be the role of the Store staff to have responsibility for the technical fitting of equipment and to advise assessors on this matter:
- Is it clear what the Store service is responsible for?
- Who has accountability for the different functions of the Store service (one person e.g. overall Store service manager/different people)?

Store staff

An effective Store service will be reliant on an appropriate compliment of well trained, supported staff with clear direction in terms of their responsibilities:
- Are there enough staff in place to effectively deliver all aspects of the Store service?
- is there a comprehensive training programme for all Store staff e.g. including wide range of relevant health and safety training, technical knowledge of the equipment, customer care training, asbestos awareness, moving and handling, and relevant IT?
- Is there a uniform and clear service identity for staff working in the operational store service?
- Do staff have photographic id?
- Are Store staff clear about their roles and responsibilities e.g. technical competency, product knowledge, meeting Health and Safety and COSH requirements?

Retrieval, decontamination, and recycling

The Store service requires to have arrangements in place to fully maximise the retrieval of equipment. This may include information provided to service users at delivery, and labels on equipment to advise of arrangements to return the equipment. This may also include estimated timescales for the use of the equipment.

It may not be financially viable or practical to recycle all equipment, therefore Store services should financially evaluate the cost effectiveness of retrieval and recycling, and develop a policy accordingly.

When equipment is returned the service must have robust arrangements for decontamination from the point of uplift through to the conclusion of the cleaning process. The service should ensure it is considering sustainability and the impact on the environment in all aspects of its work.

The service should maximise the re-use of returned equipment by ensuring it is equipped to properly identify and repair items, and return them to stock.
- Is there a clear policy in place to maximise the retrieval and recycling of equipment?
- What arrangements are in place to encourage and support retrieval of equipment?
- What arrangements are in place for the decontamination of equipment including written procedures, processes, dedicated cleaning areas, specialist machinery?
- Are there procedures in place to ensure effective recycling including the identification of returned stock, repair, and throughput to stock?
- Does the service report against its effectiveness in recycling equipment?

Repairs, servicing, and maintenance

The Store service requires to have clear accountability, and procedures in place, for the repair, servicing and maintenance for all equipment it issues, including Out of Hours arrangements (see Health and Safety section for reference to specific legislation). In some cases this work may be carried out by specialist sub-contractors:
- Are there written procedures to advise staff and service users of arrangements for the repair, servicing and maintenance of equipment, including Out of Hours?
- How does the service ensure it is meeting relevant health and safety requirements (also see Health & safety below)?

IT-ordering system

Maximum use should be made of new technology to provide the most effective management of the store services.

- Does the service have an 'easy to access' dedicated IT system for the ordering of equipment which is accessible by all partner agencies for the direct ordering of equipment? E.g. web-based..
- Does the system support the process from order to delivery throughout?
- Does the IT system support the stock management arrangements?
- Is the system paperless?
- Is there an on-line catalogue for ease of equipment selection?
- Is mobile technology used to order/confirm delivery of equipment e.g. handhelds…?
- Can the IT system produce detailed reports as required by management of the Store service and wider management of the equipment service?

Stock control and storage

Robust mechanisms should be utilised to ensure effective stock management. All equipment should be stored in fit for purpose areas, preserving the equipment in good condition and allowing ease of access.

- Are stock control arrangements effective and responsive to demand?
- Is equipment stored appropriately?

Core stock and non-stock orders

The service should ensure that it has a Core stock for all care group and professions, and regularly review its core stock to ensure efficiencies in the procurement process, and support standardisation of practice by assessors e.g. following review the service may choose to stock one type of product as its core stock, rather than 3 or 4 different options. Ordering out with core stock products should be closely managed and audited.

- Are there procedures in place to review core stock and demand for non-stock products?
- Are there clear policies and processes in place which encourage staff to order standardised Core stock in all circumstances, wherever possible and minimise the use of non-stock/special orders?
- Is the ordering of non-stock orders recorded and reviewed as part of the performance framework?

Equipment review

Key Store staff and partners professional representatives should be involved in the ongoing review of products:

- Are there mechanisms in place to regularly review equipment?
- Do these refer to evidenced based practice?
- Are there mechanisms in place to respond to complaints/faults with products including medical device alerts?

Procurement

Procurement procedures require to be in line with legislative requirements and designed to maximise efficiencies and good practice in the provision of equipment.

Partner's representatives (managers and relevant professional reps) need to be included in the procurement and tender processes to ensure procurement strategies reflect the strategic direction and policy of the partnership.
- Are there robust, transparent, procurement arrangements in place for all equipment provided via the Store service?
- Are there established mechanisms in place to ensure the involvement of all relevant partner representatives in the procurement processes to inform the appropriate selection of equipment?

Delivery and transportation

Delivery procedures should be tightly managed offering consistency and reliability as well as flexibility where required to respond to emergencies. Transportation vehicles and processes should be fit for purpose.
- Are effective procedures in place for the delivery of equipment within agreed service timescales e.g. this may be within a set number of days or may be based on orderers selecting set dates?
- Does your service have dedicated transportation for the delivery of equipment?
- Are vehicle tracking systems used?
- Is the impact of the type and use of vehicles reviewed in terms of carbon emissions and effect on the environment?
- Do transport vehicles/arrangements allow the separation of used equipment from equipment being issued?

Health & Safety

The service requires to meet obligations in relation to Health and Safety legislation. It is essential that the service can demonstrate 'due diligence' and that comprehensive systems are in place which provide transparency and accountability in the operation of the service.
- Does the service have procedures in place to meet all Health and Safety requirements?
  - Provision and use of work equipment regulations 1998 (PUWER)
  - Electricity at work regulations 1989
  - General product safety regulations 2005
  - Health and Safety at work Act 1974
  - Lifting operations and lifting equipment regulations 1998(LOLER)
  - Management of Health and Safety at Work regulations 1999
  - Medical devices management BS EN ISO
- Are all staff trained and compliant in H&S requirements?
- Are asset management systems in place?
- Is there a programme of life cycle maintenance?
- Are clear procedures in place for Incident Reporting with clarity of roles and responsibilities between the Store service, and partners including assessors and their managers?

Demonstration and training facilities

The service should offer demonstration and training facilities.
- Are there facilities for staff to demonstrate equipment to service users if required?
- Are there appropriate facilities for staff to be trained on different types of equipment?

Performance

A Performance framework should be in place which outlines the key areas which require to be measured and monitored, to evaluate if the service is effective in its stated objectives. The performance measures should complement wider service performance, monitoring and evaluation work, and explore ways of effectively measuring outcomes for service users and their carers ('the difference being made').

Checklist 9: Performance

Service objectives

The service requires to have written service objectives which are widely communicated to all stakeholders
- Are there clear service objectives?
- How are these communicated?

Service standards

The service requires to have service standards for the Store service, and for the assessment and prescription of equipment.
- Are there service standards in place?
- How/when are these monitored?

Performance indicators

A concise range of performance indicators should be agreed by the key stakeholders and be used to monitor effectiveness in all areas of the equipment service provision. These should include response/delivery times, business efficiencies, recycling, service demand, complaints, training, and the outcomes for service users.
- Has the service identified performance indicators?
- Are these effective in evidencing service improvement?
- Do these include ways of measuring the impact of equipment provision for service users and carers?

Training and development

Staff across services who are involved in identifying equipment needs should be trained to assess and provide a wide range of community equipment irrespective of their own professional background. This training should be provided via a core 'standard provision' module'. This will ensure that service users and their carers get access to equipment more quickly and effectively without the need for additional assessment unless the complexity of their needs requires a referral for a specialist assessment.

There is therefore a requirement to ensure that staff in all of the agencies involved in the equipment service, fully understand the implications for their working practices, including joint working. Training modules should cover the aims of the joint working arrangements to provide this context for all training. In addition a range of topic specific modules should be in place to support staff who require to update their skills in particular areas of provision e.g. specialist seating, slings provision etc.

There may be some need for general awareness modules e.g. for sensory impairment equipment provision, which support the development of wider knowledge and assessment skills.

The Training programme should encompass a range of mechanisms to ensure effective learning including shadowing opportunities, buddy arrangements, and peer support forums

Checklist 10: Training

Training programme

A range of training modules and opportunities should be devised and delivered via a year round programme including a core 'standard provision module' and other topic specific modules as required. All relevant services/partners require to ensure that their staff access the core 'Standard provision' training module as a minimum, and any additional training modules, relevant to their service needs.
- Is there an annual training programme in place?
- Does this provide a range of learning opportunities? E.g. online modules as well as face-to-face?
- Are there dedicated staff to administer and manage this?
- Is there joint funding for training in the Equipment service budget?

Training modules

The training modules should strongly emphasise good assessment practice and encourages prescribers to consider their reasoning for provision, contraindications, recording of decision making, and encourage avoidance of over-prescription. The training should be developed around an agreed competency framework.
- Is there a range of appropriate training modules in place?
- Is training evaluated to evidence levels of competency and confidence in staff assessing for equipment?
- Is there an agreed competency framework and if so, how is this applied?

Trainers

Effective equipment is often reliant on the use of practitioner trainers from across professional and agency services. Where possible these trainers should be paired with colleagues from other professions/service settings/ agencies to mix the experience and enhance the joint working ethos. It is expected that services/partners will ensure that their service areas all contribute to the provision of appropriate staff to act as trainers and support the delivery of the training programme.

- Is there a pool of mixed profession practitioner trainers?
- How are trainers supported and evaluated in their own competency?
- Is there a need to access training externally?

Service users and carer involvement

To make the training as effective as possible service user and carers experiences should be reflected in the training mediums e.g. use of digital stories, case studies etc. Service users and carers' views should also influence the development of training modules.

- How are you reflecting service users' views in your training?

Appendix 1: Pyramid of Need