

CABINET

21 FEBRUARY 2025

REPORT OF THE PORTFOLIO HOLDER FOR PARTNERSHIPS

A.8 TENDRING CARELINE: DECISION ON THE FUTURE OF THE SERVICE

PART 1 – KEY INFORMATION

PURPOSE OF THE REPORT

To seek the Cabinet's decision on the future of the Council's Careline service having regard to:

- updated financial analysis for different options;
- the exploration of proposals from third parties who, through last year's consultation exercise, expressed an interest in taking on all or part of the service;
- the likely strategic and practical implications of emerging proposals for Devolution and local government reorganisation;
- the aims and objectives of the North East Essex Health and Wellbeing Alliance for an integrated 'place-based' health system approach; and
- the need to ensure best value and quality of service for residents and service-users in the context of an expanding and increasingly competitive private market for telecare, response and lifting services.

EXECUTIVE SUMMARY

The main recommendation within this report is that the Council proceeds, broadly in line with the Cabinet's previously stated preferred option, to withdraw itself from the market for providing telecare, response and lifting services. However this is proposed to be achieved in a managed way through an arrangement with Colchester City Council's 'Helpline' service (provided through its arms-length company Amphora) to transfer service users and staff on existing or similar contractual terms and conditions to Colchester Helpline and for it to expand its team, resources and reach to serve the whole of the North East Essex area.

This recommendation is reached following the consideration of revised financial analysis that takes into account updated assumptions that reflect the significant net reduction in projected cost pressure in continuing to run the Careline service resulting mainly from the termination the YourStride contract and other unviable third-party contracts. Whilst the updated figures show a reduction in the projected cost pressure compared to earlier estimates, they still demonstrate the need for significant subsidy from Tendring taxpayers to continue with the Careline service in its current form with a reduced number of staff and against the backdrop of staff recruitment and retention challenges in a widening and increasingly competitive private market for similar telecare services.

Consideration of third-party proposals that emerged from the consultation process shows that Helpline is best placed amongst others to offer a long-term solution, through an approach that aligns with the aims and objectives of the North East Essex Health and Wellbeing Alliance, to which Tendring District Council is a partner, for an integrated 'place-based' health system approach that supports people to live independently within their homes and reduces pressure on the wider system. This approach also enables the Council, through its partnership with the Alliance, to retain influence and scrutiny over the way the service is provided in the future, with the benefit of no ongoing financial liabilities and with Helpline being able to operate in a viable manner over a wider geography by achieving economies of scale.

It is also advised that the Council's Out-of-Hours, CCTV and Sheltered Housing monitoring service also form part of the transfer to Colchester Helpline through an outsourcing arrangement on completion of the current review which has identified many complexities and inter-relationships between Careline, the Out-of-Hours service and other services across the Council. It is suggested that the outsourcing of these Out-of-Hours functions to Helpline, for an annual fee, should also happen within the same timescales for transferring service-users and staff from Careline.

To aid a smooth transition and ensure maintained quality of service to residents in Tendring, it is proposed that accommodation at Barnes House in Clacton is made available for the running of the expanded Helpline service, on commercial terms, until at least March 2026 - providing a temporary base within the Tendring area to maintain effective response times while more permanent long-term arrangements are considered and put in place. The income sought from Helpline for this accommodation can be off-set against the fee payable for the provision of Out-of-Hours coverage and/or any contribution the Council makes towards the one-off cost of upgrading and digitisation of service-users' equipment.

A significant change to the context of the decision-making process since the previous report to Cabinet in November 2024, is the Government's announcements around devolution and local government reorganisation, which is expected to see the replacement of the two-tier authority structure with a series of new unitary authorities by 2028. The proposals and recommendations set out in this report therefore not only respond positively to the feedback from last year's consultation with service users and other interested parties in ensuring continuity and stability, but they also align in practical terms with the direction of travel that local government reorganisation across Essex would introduce. The merging of resources across Tendring, Colchester and potentially other existing authority areas would be a natural outcome of reorganisation as a means of achieving economies of scale and efficiencies and the recommendations within this report are therefore consistent with that approach.

This report includes an indicative transition plan outlining key stages of the transfer process, which will be expanded upon with a detailed transition plan to be agreed and implemented in collaboration with Colchester Helpline. The programme includes provision for the Council to continue to procure temporary support from other suitable private third-party telecare

providers, on a call-on basis, to provide continuity of service for Careline users over the transition period while the transfer to Helpline takes place.

RECOMMENDATION(S)

It is recommended that the Cabinet:

- a) notes the content of this report, including the updated financial information relating to alternative options for the future of Tendring Careline, updated information on numbers of service-users and staff, the latest position in relation to third-party contracts and the consideration of third-party proposals for taking on all or part of the Careline service;**
- b) notes also the latest position in respect of proposals for local government reorganisation across Essex, including the likely replacement of County and District Councils with unitary authorities, and the potential practical implications for services such as Careline in the future;**
- c) in light of the information noted as per recommendations a) and b), supports the proposal from Colchester City Council and its Helpline Service (provided through its arms-length company Amphora), based on the outcome of the evaluation set out within this report;**
- d) subject to a) to c) above, agrees to the creation of a combined and expanded telecare, response and lifting service for North East Essex that aligns with the aims and objectives of the North East Essex Health and Wellbeing Alliance for an integrated health-system approach; and to agree heads of terms on the following principle conditions:**
 - i) it is achieved through the automatic transfer of all remaining Tendring Careline service-users to the service provided by Colchester Helpline on their existing terms of conditions and with no ongoing financial liability to Tendring District Council following that transfer;**
 - ii) that Colchester Helpline undertakes to guarantee service coverage to residents across all parts of the Tendring District so as to ensure that no part of the district is left without access for residents to a paid-for telecare, response and lifting service;**
 - iii) that Colchester Helpline's existing average response times are maintained and where possible improved upon in providing coverage to residents in all parts of Tendring – with measures put in place, as necessary, for one or more outposts in locations (see also i) below) providing accessibility for all parts of Tendring – and at no ongoing cost or liability to Tendring District Council; and**

- iv) that Tendring Careline's existing staff will transfer to employment within the expanded Colchester Helpline, respecting existing terms and conditions and with no ongoing financial liability to Tendring District Council resulting from that transfer.**
- e) agrees in principle that the Council's Out-of-Hours, CCTV services and monitoring for the Council's own sheltered housing schemes will also transfer to Colchester Helpline under an outsourcing arrangement within the same timescales for achieving the proposal under recommendation d), which will be considered as part of the associated negotiation and subject to separate decision as necessary;**
- f) that subject to a) to e) above, the transfer be facilitated, as early and as smoothly as possible within the 2025/26 financial year;**
- g) agrees that, from the date of this decision, any new prospective Careline customers are to be signposted to Colchester Helpline as the Council's preferred alternative trusted provider, in light of the proposal under d) above;**
- h) agrees an extension to the exemption of Procurement Procedure Rules to allow the use of the company Careium for the ongoing provision of casual call-handling support over the period of transition, as required, to ensure continuity of service to remaining service-users during times of staff shortage;**
- i) agrees to give delegated authority to the Portfolio Holder for Partnerships (in consultation with the Leader of the Council and Portfolio Holder for Finance and Governance; Director for Planning and Community; Monitoring Officer; s151 Officer; and Head of People) to progress and deliver the following:**
 - i) the preparation of a detailed transition plan in collaboration with Colchester City Council and Colchester Helpline, including the associated legal agreement and specific tasks and timescales for the achievement of the proposals under recommendations e) and e), having regard to the broad Indicative Transition Plan outlined within this report;**
 - ii) the termination of any remaining third-party customer and supplier contracts with Tendring Careline;**
 - iii) the entering into contracts with one or more suitable third-party providers of telecare, response and/or lifting services to call upon additional staffing resource during the period of transition to ensure continuity of service to remaining service-users and to provide additional resources as required;**
 - iv) the agreement with Colchester Helpline for the use of accommodation at Barnes House, on a short-term lease and on commercial terms, for use as a temporary outpost for the provision of the expanded North East Essex service while a permanent location is sought;**

- v) **the agreement to any financial contribution towards the upgrading of all existing Tendring Careline service users to digital equipment either before or after the transfer to Colchester Helpline – utilising a proportion of the agreed implementation budget; and**
- vi) **the utilisation of the remainder of the implementation budget, as appropriate, for purposes relating to the achievement of the proposals under recommendations d) and e).**
- j) **confirms that all efforts will be put in place to work constructively with Helpline to support service users through a smooth and timely transfer to the expanded North East Essex service and that for any service users that wish to ‘opt out’ of an automatic transfer, support will be provided in signposting them to other alternative providers;**
- k) **confirms that the Council will continue to support affected staff through the transition to the expanded North East Essex Helpline service; and**
- l) **agrees that the costs associated with these recommendations is met from within existing budgets, including the one-off implementation budget amount of £0.746m, and that the use of these budgets is delegated to the Director Planning and Community in consultation with the Leader of the Council and Portfolio Holder for Finance and Governance; and the Portfolio Holder for Partnerships.**

REASON(S) FOR THE RECOMMENDATION(S)

Given the changing market context, the recommendations are based on what is considered to be the best option for both service users and the Council. Furthermore, Essex County Council provides a free of charge service, if a resident is referred to them through a statutory provider, such as Adult Social Care or a health care provider – albeit this is a heavily subscribed service with a considerable waiting list for people wishing to access it. It is also important to highlight the continuing capacity challenges the authority faces in meeting the needs of a range of service users, including those supported by third-party contractual arrangements.

Whilst the updated financial analysis in this report demonstrates that the Council’s decision to terminate Careline’s contract with YourStride should, with some streamlining and other efficiencies within the service, result in a lessening of ongoing budgetary pressures, it would still incur an ongoing budget shortfall that would need to be met through subsidy from Tendring taxpayers, alongside a significant one-off cost in modernising the service to be fully digital by January 2027. The challenges around staff recruitment and retention are also likely to continue – with a streamlined team likely to be more susceptible to staff loss and disruption to service quality in what is becoming an increasingly competitive market.

In an environment where local authorities like Tendring District Council are under increasing pressure to make cost-savings whilst maintaining high quality and cost-effective services to its residents, and where central government is promoting collaborative working and the reorganisation of local government to achieve economies of scale, it would be prudent to seek alternative ways in which a service like Careline can be provided – including withdrawal from the competitive market and/or merging resources with neighbouring authorities.

The recommended managed transfer of service-users and staff to an expanded service provided by Colchester's Helpline offers the opportunity for the Council to withdraw the current service from the market in a smooth manner; and in a way that respects and responds positively to the feedback from service-users to last year's consultation exercise – seeking stability and continuity of service at an affordable price.

Working predominantly with one trusted alternative partner to achieve an efficient transfer of service (with support from other providers as necessary through the transition) offers fewer safety and exclusion risks to service-users and compulsory redundancy risks for staff than an approach involving ceasing the service and attempting to support individual service users and multiple individual staff in to find alternative service providers and alternative employment on the open market in an uncoordinated or piecemeal manner. The latter would likely escalate uncertainty for all concerned, result in increased numbers of residents seeking provision, at short-notice, from the Essex County Council's heavily-subscribed free service, increasing the risk and cost of compulsory redundancies and making for a less efficient use of the agreed funding for implementation.

The choice of Helpline over other interested third-parties for this transfer offers the following advantages:

- the creation of a service for the whole of North East Essex that will deliver upon the aims and objectives of the North East Essex Health and Wellbeing Alliance for an integrated health service approach that enables people to be looked after in their own homes, reducing pressure on the emergency services and reliance on the heavily-subscribed free services provided through Essex County Council;
- the creation of a service that benefits from economies of scale in the interest of financial sustainability, with no ongoing financial liability falling to Tendring District Council, but with the ability for the Council to retain a level of influence and scrutiny over the way in which the service is provided – through its role as a partner to the Health and Wellbeing Alliance;
- continuity for Careline's existing and remaining service-users with no substantive changes to their terms and conditions (including fees) resulting from the transfer to Helpline;

- retention of opportunities for existing Careline staff through a TUPE or other similar arrangement that protects their existing local government terms and conditions – minimising the risk and cost of any compulsory redundancy;
- increased resilience to future recruitment and retention problems, with the ability for Helpline to draw upon a wider pool of local employees to ensure service coverage and maintaining its high-quality two-person response and lifting service; and
- alignment with the direction of travel around Devolution and local government reorganisation which will likely see the sharing and merging of resources between the neighbouring authorities of Tendring and Colchester with a view to achieving efficiencies and economies of scale.

The current review of the Council's Out-of-Hours, CCTV and Sheltered Housing monitoring services has identified complex inter-relationships between these services and those provided elsewhere across the Council which have required more time for consideration of potential future long-term options. It is however recommended, that outsourcing these services to Colchester Helpline offers the best long-term solution – particularly given the direction of travel around Devolution and future local government reorganisation and it is advised that this is delivered as part of the arrangement with Colchester Helpline to transfer Careline service-users and staff.

ALTERNATIVE OPTIONS CONSIDERED

As previously presented in reports to Cabinet in July 2024 and November 2024, five alternative options for the future of the Careline service have been under consideration with the Cabinet's preference for Option 2 (withdrawal from the market) explained and supported within each of those reports. The different options are revisited as part of this February 2025 report with updated financial assumptions that take into account the Council's decision in October 2024 to terminate the YourStride contract. All options, with the exception of preferred Option 2 still show a budgetary shortfall (albeit a substantially reduced one) that would require ongoing public subsidy.

The Council could choose to continue running Careline with the current number of staff and focus only on serving Tendring residents and accept the need for ongoing subsidy. This would however have to be with the intention that the subsidy could be reduced over time through increasing the customer base and continuing with efforts to improve efficiency. However with a smaller and less resilient team, concerns about recruitment and retention of staff within in an increasingly competitive market are all the more acute and by the time the service is able to increase its customer base to a level that might achieve a degree of profitability, it is highly likely that local government reorganisation will be taking place – and there would be little sense Colchester and Tendring offering separate, but almost identical services that would need to merge by default.

Therefore, as a variation on the Cabinet's preferred Option 2, this report considers further opportunities to transfer all or part of Careline to one or more alternative trusted providers within a defined transition period – following the consideration of proposals put forward by a number of third-party providers who, as part of last year's consultation exercise, expressed an interest. Of the three proposals considered through this report, it is recommended that Colchester's Helpline service is best placed for such a long-term solution and a managed transfer (for the advantages set out above), but with the other providers still having a potentially important role in supporting the Council, through temporary contracts, through the transition period.

For the Out-of-Hours, CCTV and Sheltered Housing monitoring services, there are various options for their long-term future that could include retention in-house, outsourcing to a private call-centre or a hybrid approach. It is recommended however that outsourcing to Colchester Helpline as part of the arrangement to transfer Careline service-users and staff provides the most logical option and will support the viability and efficiency of a combined service in the context of future local government reorganisation.

PART 2 – IMPLICATIONS OF THE DECISION

DELIVERING PRIORITIES

The Careline service was established in 1987 and provides a high-quality service that provides monitoring and response/lifting for approximately 1,500 individual service users in Tendring, in addition to many sheltered housing residents.

A revised Corporate Plan and Vision was approved by Full Council at its meeting on 28 November 2023. One of the six included themes is Financial Sustainability and Openness, with a commitment to continue to deliver effective services and get things done whilst looking after the public purse; that means carefully planning what we do, managing capacity and prioritising what we focus our time, money and assets on. In the Plan and accompanying Vision, the authority has made a commitment that tough decisions will not be shied away from, but will be taken transparently, be well-informed, and based upon engagement with our residents.

The recommendations set out in this report reflect the consideration of updated financial assumptions for alternative options for the future of Tendring Careline that in-turn reflect the prudent decision taken by the Council in October 2024 to terminate the YourStride contract. They also reflect Officers' consideration of third-party proposals for taking on all or part of the Careline service if it were decided that the current service will cease which, in turn, takes into account financial, equality and other factors.

The recommendations, at their heart, seek an approach that delivers positive outcomes for the quality of service to Tendring residents, employment security for staff and efficient and best

value use of public money and Council budgets. This comes at a time of financial constraint and when central government is promoting collaborative working and the potential reorganisation of local government to achieve economies of scale.

OUTCOME OF CONSULTATION AND ENGAGEMENT (including with the relevant Overview and Scrutiny Committee and other stakeholders where the item concerns proposals relating to the Budget and Policy Framework)

The Best Value Duty relates to the statutory requirement for local authorities and other public bodies defined as best value authorities in Part 1 of the Local Government Act 1999 (“the 1999 Act”) to “*make arrangements to secure continuous improvement in the way in which its functions are exercised, having regard to a combination of economy, efficiency and effectiveness*”.

In practice, this covers issues such as how authorities exercise their functions to deliver a balanced budget ([Part 1 of the Local Government Finance Act 1992](#)), provide statutory services and secure value for money in all spending decisions.

The Council, as a best value authority is also required, pursuant to [section 3 of the 1999 Act](#), to consult on the purpose of deciding how to fulfil the Best Value Duty. This is the stage at which consultation will best assist the authority in deciding how to make arrangements to secure continuous improvement, however, a consultation exercise was conducted in 2024 with the service users, next of kin and key stakeholders providing them with information about the reasons for the proposed option for the Council to cease providing telecare/lifting/response provision and available options and alternative service providers.

The results of that consultation were reported, in full, to the Cabinet on 15 November 2024 which revealed a majority preference (72%) amongst existing service users of Option 1: continuing with Tendring Careline and remaining in the market, which would require on-going financial support – with only 10% in favour of the Cabinet’s preferred approach Option 2: to cease the telecare, response and lifting service. Less than half (48%) of service users indicated that they would be prepared to pay more for the service if it were to continue. 60% of responders indicated a willingness to move to a trusted alternative, if the Council was minded to cease the service; but if that were the case, the vast majority (80%) would require support through a transition.

The recommendations within this report propose a course of action that respects and responds positively to the consultation feedback. Whilst the proposal is to proceed, in principle, with the Cabinet’s preferred option of ceasing the telecare, response and lifting service in its current form, it provides for the smooth transfer of service-users and staff to a trusted alternative provider on similar or existing terms and conditions with minimum bespoke support required (unless individuals specifically opt-out) and no noticeable change in the specification of service, as well as an improvement in quality provided through Colchester Helpline’s two-person response. This approach is designed to maximise continuity, achieve stability and minimise

uncertainty.

The recommendations also respond positively to the consultation feedback in the sense that they follow consideration of third-party proposals, submitted through that consultation, for taking on all or part of the service. Informal consultation with affected staff following the Cabinet's decision in November 2024, with support from the Council's Union representatives, has indicated understandable disappointment at the prospect of ceasing the service in its current form, but encouragement for exploring the possibility of transferring service-users and staff to a trusted alternative provider, with Colchester Helpline being the general preference given its similarity to Tendring Careline and its current operation within Tendring.

Updated Customer Terminations

In November 2024, it was reported to the Cabinet that since the start of the consultation, 126 customers had left the Careline service. Since that report, a further 77 customers have left. Through the termination of the YourStride contract, which will have come to an end on 20 February 2025, there are a further 9,500 customers (mostly from outside of the Tendring District) that are no longer served by Tendring Careline.

On commencement of the 12-month review of Careline in 2023, the Council has not been taking on any additional service users – while the long-term future of the service remained in question. This has resulted in lost opportunity for income which will have had a bearing on the updated financial assumptions, it has also impacted upon the reputation of Careline as it has not been in a position to assist and service prospective new service-users and nor has it been in a position to recommend any particular third-party as a trusted alternative provider.

The recommendations in this report seek confirmation that in seeking to transfer existing service users to Colchester's Helpline service, other prospective service users can now be positively signposted to Helpline – as a trusted alternative provider, not to the exclusion of other third-party private providers operating in the market (who will have no doubt already benefited from Tendring District Council's non-participation in taking on new customers since 2023), but in a way that helps to minimise the risk of vulnerable Tendring residents not being able to access the telecare service they require.

This approach is considered to be a reasonable response to the 2024 consultation which clearly revealed a general preference for stability, continuity of service, minimal fee increases and assistance for any transfer to an alternative provider.

Updated Staff Headcount

In November 2024, it was reported that staff numbers had reduced by 14% since the start of the consultation (from 46 to 40). Since November, there have been a further 16 staff losses (leaving just 24 full and part-time staff remaining in post) and the Council has needed to continue to call upon third-party provision. Whilst the termination of the YourStride contract will have impacted mainly on the number of calls to the service handled by the call-handling staff, some of the critical staff losses have also been amongst the responding and lifting staff which impacts upon the Council's ability to respond to service users in a timely manner, the quality of service, and

likelihood of needing to call upon the emergency services for assistance.

On commencement of the 12-month review of Careline in 2023, the Council has not been taking on any additional staff – while the long-term future of the service remainder in question. This has increased the pressure on existing staff, resulting in a number of vacancies within the service not being filled and increased reliance on third-party and casual assistance.

Whilst the level of third-party support can be reduced to an extent following the termination of the YourStride contract and associated reduction in anticipated call-numbers, it is anticipated that there could be further staff losses during any transition period recommended within this report – for which it is proposed temporary support and cover from third-party providers will still need to be called upon – both for call handling and response/lifting.

The staff are thanked for their continued dedication under difficult circumstances and have been reminded throughout the review process that the Cabinet’s preference, in principle, to cease the service in its current form is in no way a reflection on the quality of their work or their level of dedication. It is hoped that the recommended approach set out in this report will give greater clarity to staff in terms of the direction and that they will know that they are valued and will be supported going forward with the aim of keeping compulsory redundancy to a minimum.

Update on third-party contracts

At the time of the Cabinet report in November, Tendring Careline was serving 14 external contracts of varying sizes generating various levels of income. As reported previously, the decision was taken to terminate the largest of these (YourStride) which will have come to an end on 20 February 2025 and another smaller contract has since been terminated by the customer. The 12 remaining contracts serve mainly a number of almshouses and private sheltered housing schemes and smaller personal alarm watch (PAW) providers – but it would be the intention, if the Cabinet agrees the recommendations in this report, to review and potentially put all of those customers on notice of termination – allowing them time to find alternative providers during the proposed transition period, albeit notifying them of the Council’s arrangement to transfer services to Colchester Helpline as a trusted provider.

LEGAL REQUIREMENTS (including legislation & constitutional powers)

Is the recommendation a Key Decision (see the criteria stated here)	YES	If Yes, indicate which by which criteria it is a Key Decision	<ul style="list-style-type: none"> ✓ Significant effect on two or more wards ✓ Involves £100,000 expenditure/income ✓ Is otherwise significant for the service budget
		And when was the proposed decision published in the Notice of forthcoming decisions for the	8 January 2024

		Council (must be 28 days at the latest prior to the meeting date)	
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Best Value

In practice this covers issues such as how authorities exercise their functions to deliver a balanced budget (Part 1, Local Government Finance Act 1992), provide statutory services and secure value for money in all spending decisions.

As a best value authority the Council is also required, pursuant to s.3 of the Local Government Act 1999 , to consult on the purpose of deciding how to achieve the Best Value Duty. This is the stage at which consultation will best assist the authority in deciding how to make arrangements to secure continuous improvement.

Therefore, a consultation exercise was conducted with the service users and other key stakeholders, when they were provided with information about the reasons for the proposed option for the Council to cease providing telecare/lifting/response provision and available options and alternative service providers.

Best Value - The general duty

- (1) A best value authority must make arrangements to secure continuous improvement in the way in which its functions are exercised, having regard to a combination of economy, efficiency and effectiveness.

The rationale behind the requirement is to consult when proposals are at a formative stage. If consultation is to be meaningful, it needs to be undertaken at a point where the mind of the decision-maker is still open to change and can, therefore, be influenced by the responses to the consultation. A decision-maker can consult upon a preferred option and even a decision in principle, provided that its mind is genuinely open. The outcome of the consultation was taken into account by the Cabinet at its meeting in November 2024.

Legal status of Careline and contractual position of service-users

Tendring Careline is an in-house discretionary service aimed at allowing service users to remain living independent in their homes. It is not a state entity, Local Delivery Vehicle, company or other legal entity in its own right. Therefore, any contracts with individual service-users and third-party customers or suppliers are with Tendring District Council which, in turn, has the right legally to determine how those contracts are handled.

The recommendations within this report are therefore not (and cannot be) to 'sell' or outsource Careline to another provider as an entity in its own right, but to transfer each of the individual service-users' supply or service contracts with Tendring District Council to one preferred alternative provider of a similar service i.e. Helpline – which is owned by Colchester City

Council and run through its arms-length company Colchester Commercial (Holdings Ltd), part of Amphora Trading Limited. This is on the basis that Helpline has been identified as a suitable body to take over these contracts due to the advantages set out elsewhere within this report, whilst still offering the option for service users to 'opt-out' of an automatic transfer if they do not wish for their contract to pass to Helpline.

Taking this approach, as opposed to terminating all of the Council's 1,500 or so individual service-user contracts and leaving those residents to separately find alternative provision in the open market, with or without support, would help address the risk that some vulnerable residents might not find the support they need, that many may seek assistance from the over-subscribed free service provided by Essex County Council (for which there is a long waiting list) and that a significant amount of Council resource is used to provide direct support to up 1,500 individuals, which would not be an efficient use of that resource. There is also a greater risk of compulsory redundancy for any staff for which appropriate redeployment cannot be found.

Instead, the proposed approach of an automatic transfer of all service-user contracts to a single alternative trusted provider of the same or a similar service, offers continuity for those service-users and keeps to a minimum the risk of vulnerable residents not finding an suitable alternative provider, as well as minimising the risk of any claim against the Council if any service-user finds themselves unknowingly left without provision.

For the purposes of third-party contracts, as explained above, the recommendation is to review and serve notice to terminate the remainder of those contracts - albeit notifying them of the Council's arrangement to transfer services to Colchester Helpline as a trusted provider

The Indicative Transition Plan contained within this report sets out, in broad terms, the measures that would be employed to ensure all service users are notified and advised of the changes to the way in which their contracts will be served going forward and how opportunities will be given to 'opt out' of a transfer to Helpline. If the recommendations in this report are agreed, Officers will work in collaboration with Colchester Helpline to produce a more detailed transition plan for the practical achievement of the proposed transfer.

The Government's "English Devolution" White Paper was published on 16 December 2024. The White Paper does not solely address devolution matters; it also references local government reorganisation. The Government expects all two-tier areas and smaller or failing unitaries to develop proposals for reorganisation. Those existing Councils are to be replaced with new unitary councils (which the Government says should have 'as a benchmark' a population of 500,000 or more). Further to this, the report references a letter of the same date (16 December) from the Minister of State for Local Government and English Devolution to Leaders of Councils in two-tier areas (and adjoining unitary councils). This letter included proposals to postpone elections scheduled for May 2025 to May 2026 (initially) where one or other of the following scenarios exist:

- Areas who are minded-to join the Devolution Priority Programme, where they will be

invited to submit reorganisation proposals to Government by Autumn 2025.

- Areas who need reorganisation to unlock devolution, where they will be invited to submit reorganisation proposals to Government by May 2025.

Locally, in the week 6-10 January 2025, Essex County, Thurrock and Southend-on-Sea City Councils met separately as 'Upper Tier' Authorities to consider the separate but related matters of (1) devolution, (2) local government reorganisation and (3) whether to request deferral of elections to their respective Councils from May 2025 to May 2026 (initially). Following those meetings, the County Council, alongside Southend-on-Sea City Council and Thurrock Council, are writing to the Minister to request participation in the Devolution Priority Programme (devolution and local government reorganisation), and to request the postponement of elections scheduled for May this year in the County Council and Thurrock Council areas. There are no scheduled elections to Southend-on-Sea Council for May 2025.

Earlier this month, it was announced in Parliament that Greater Essex has been accepted as part of the Priority Programme. There is a tight timescale, but the underlining themes are to ensure capacity remains in local government through unitary structures prioritising the delivery of high quality and sustainable public services to citizens. The new structure must improve local government and service delivery and should avoid unnecessary fragmentation of services. Opportunities to deliver public service reform should be identified, including where they will lead to better value for money and any proposals should show how councils in the area have sought to work together in coming to a view that meets local needs and is informed by local views.

Employment Law and TUPE arrangements

To run Careline, the Council currently employs 24 members of staff on full-time and part-time permanent contracts, across a range of call-handling, physical response, managerial, supervisory and administrative roles – with the majority of those staff being call-handlers. Where organisations are looking to merge or transfer services, TUPE arrangements can apply, allowing for an automatic transfer of staff to new employment with a different employer with protection of existing terms and conditions and employment rights. The applicability of TUPE depends on how the proportion of work carried out by employees under their existing duties corresponds with the work they could be expected to carry out, within a similar role, with the other organisation.

The work of Tendring Careline and Colchester Helpline is either identical or otherwise very similar in many respects. If the Cabinet agrees with the recommendations in this report, Officers would continue detailed exploration with the Directors of Colchester Helpline to fully determine the extent to which TUPE transfer arrangements will apply to TDC's remaining Careline staff and/or whether other similar arrangements that allow the transfer of staff on the same, or similar, terms and conditions can be put in place. Officers would, throughout, take specialist/legal advice as appropriate in consultation and liaison with Trade Union representatives. Staff would be consulted on and given the opportunity to opt out of any

arranged transfer.

The overarching objective at all times will be keep the risk and potential cost of compulsory redundancy to a minimum; and supporting staff at all times with the aim of facilitating the transfer to Helpline of as many employees as possible to serve the expanded Helpline service.

It is important to note that the authority also employs several casual workers within the Careline service. Therefore, their individual contract arrangements must be reviewed and considered in the context of any potential TUPE transfer.

As it currently stands, with the recommended transfer to Colchester Helpline of service users, Careline staff and the Out-of-Ours and CCTV monitoring services, there is a strong likelihood that TUPE could apply – thus enabling a smooth transfer of staff to serve the expanded Helpline service. Officers will continue to liaise closely with HR counterparts in Colchester City Council and Colchester Helpline to establish the legal position.

Once the Heads of Terms are negotiated the legal powers to support the agreement and transfer can be set out in detail, as there are a number of pieces of legislation which allow public authorities to work together and share services and resources.

YES	The Monitoring Officer confirms they have been made aware of the above and any additional comments from them are below:
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The report has been prepared with thorough involvement and consultation with the Monitoring Officer and once the Heads of Terms are negotiated the full and final structure for the proposal can be supported by legal powers. However, it is clear from the Government's White Paper on Devolution and accepting Greater Essex onto the Priority Programme for Local Government Reorganisation that this proposal meets the expectations of public sector resources coming together to deliver high quality services for the residents.

The legal agreements for the model of transfer will need detailed consideration and the timescale for the programme should reflect the complexity of the proposal and sufficient resources allocated to ensure the Council has capacity to deliver the Cabinet's decisions.

FINANCE AND OTHER RESOURCE IMPLICATIONS

Updated financial assumptions for Options 1-5

The report to Cabinet of 26 July 2024 set out the financial performance of the Careline Service which identified that in 2023/24, the Council would have to subsidise the service by £403,000 for that financial year; with a forecast subsidy for 2024/25 totalling £521,000. The five options for the future of the Careline service set out within the July 2024 report (and referred to again within the November 2024 report) were accompanied by financial analysis – with options costed based on each aspect of the service, including staffing, working patterns, service contracts,

Out-of-Hours and the Telecare Services Association (TSA accreditation).

The Council's decision in October 2024 to terminate the YourStride contract (as detailed in the November Cabinet report) and the end of that contract on 20 February 2025 is projected to have a significant impact on the financial performance of the service, if it was to carry on into the future. It results in a significant reduction in total revenue income to the service but an even more significant reduction in anticipated calls and the requirement for permanent and/or casual call-handling staff, system costs and administrative time. The net result of this change is considered to be positive in financial terms because the cost of serving the YourStride contract was exceeding the income being generated which, in part, justified the urgent decision to bring that contract to a close. This is based on forecasting ahead to 2025/26 and beyond, with 2024/25 currently presenting a net positive position due to the income growth from the Yourstride contract but with the lack of capacity and limitations imposed by the terms and conditions negotiated to fully meet the service requirements of that growth.

To enable the Cabinet to make an informed decision about the future of the Careline service in February 2025, the financial assumptions have been revisited and updated to provide an additional option for retaining Careline in its current form that reflects the decision to terminate the YourStride contract and which, in effect, is a combination of Option 3 (a reduction in shift patterns and staff) and Option 5 (termination of third party contracts). The significant reduction in staffing cost in the updated Option 3/5 would result from a rationalisation of the permanent staffing requirement and thus the baseline budgetary costs that would be required to effectively run a service that handles fewer calls. Because there are currently a significant number of vacancies in the current staffing structure, a reduction in the size of the structure would not necessarily result in any redundancy costs.

The updated financial assumptions for Options 1-5 along with the combined Option 3/5 are detailed in Appendix 1 to this report and are summarised, showing changes from the July 2024 Cabinet report to now, below:

- **Option 1** – Maintain current position (*remain in the market, which will require on-going financial support*);
- **Option 2** – Provide an Out-of-Hours Council service only (*leave the market, focussing on the Council's core business and ceasing telecare and response/lifting*);
- **Option 3** – Reduce shift pattern to 6 hourly shifts (*remain in the market, staffing changes required, which will require on-going, additional financial support*);
- **Option 4** – Remove the responder/lifting service (*remain in the market, removal of one element of the service, which will require on-going, additional financial support*); and
- **Option 5** – Termination of third-party contracts (*remain in the market and service Tending District Council residents only via the Careline scheme, which will require on-going, additional financial support*) and cessation of the TSA accreditation.
- **Option 3/5** – Combination of Options 3 and 5 (reduction total staff numbers and shift patterns as well as the termination of all third party contracts).

Table 1: Updated financial analysis of Options

Option		Potential Budget Required (£)	Potential Cost Pressure Required (£)	Potential One-off Costs required (£)	Alternative Providers in the Market	Comments/ Considerations
1	Jul24 Report	487,538	262,468	286,830	Yes	Unchanged from July 2024 figures. Recruitment/retention challenges would remain along with challenges of a competitive market.
	Feb25 update	487,538	262,468	286,830		
2	Jul24 report	151,934	(72,956)	746,000	N/A	Unchanged from July 2024 figures.
	Feb25 update	151,934	(72,956)	746,000		
3	Jul24 report	350,303	125,413	306,830	Yes	Reduction in one-off costs from July 2024 figures. Recruitment/retention challenges would remain along with challenges of a competitive market.
	Feb25 update	350,303	125,413	286,830		
4	July24 report	425,577	200, 687	378,395	Yes	Reduction in one-off costs from July 2024 figures. Recruitment/retention challenges would remain along with challenges of a competitive market.
	Feb25 update	425,577	200,687	358,395		
5	July24 report	403,435	178,545	286,830	Yes	Unchanged from July 2024 figures. Recruitment/retention challenges would remain along with challenges of a competitive market.
	Feb25 update	403,435	178,545	286,830		
3/5	Feb25	<u>274,692</u>	<u>49,802</u>	<u>286,830</u>	Yes	Significant net reduction in costs but budgetary shortfall remains. Recruitment/retention challenges would remain along with challenges of a competitive market.

The Option 3/5 scenario of retaining Careline and running it purely for Tendring customers with fewer staff and no external third-party contracts leaves a total projected budgetary requirement for future years of just under **£275,000** (net of fee-generated income and other income) which would still be above the agreed 2024/25 budget level of just under £225,000 – thus representing a projected ongoing cost pressure of circa £50,000 for 2025/26 and onwards that would need to be met. This is without the identified additional one-off cost requirement of just under £287,000 for necessary system upgrades.

A revised 2025/26 cost estimate of £275,000 plus a one-off cost of £287,000 (**a total net cost of circa £560,000**) marks a significant improvement on the £774,000 that would have been required under the original Option 1 scenario of retaining Careline with the full staffing structure required to serve the YourStride and other third-party contracts (noting that the one-off costs could be spread over one or two years). However, these figures still represent a substantial level of public subsidy needed to maintain a service that is provided, in a more financially profitable manner and at comparable prices, by other providers in the open market.

Whilst over time the service could strive to achieve further efficiencies and compete for new business to expand its customer base, it would likely take a number of years to reach a level by which subsidy is eliminated and a profit might be achieved – by which time the market will have become even more competitive, local government reorganisation is likely to have taken place and authorities will have already merged.

Furthermore, and perhaps more importantly, reductions in staff through the deletion of vacancies, whilst achieving a reduction in budgetary cost, does not resolve the inherent challenges around recruitment and retention of staff in an increasingly competitive market. For example, different permutations of the level of staff and other resources required could be made, which would require additional budgetary provision over and above the £50,000 mentioned above. However, the recruitment and retention of those differing levels of staff would remain very challenging at the levels required to maintain a 24/7 service that Careline is inherently required to provide.

Having a smaller pool of staff impacts significantly on resilience with an increased risk and likelihood of staff shortages during difficult-to-cover periods. This could have a critical impact on service provision which is more avoidable with larger teams, as would be created by transferring staff and expanding the Colchester Helpline Service to serve the wider North East Essex geography.

This key underlying factor is therefore seen as a primary determinant in terms of considering the future of the service and the recommended option of working with a third party that seeks to provide the necessary response that allows the continuation of service for existing users along with potential new customers.

In both July 2024 and November 2024, the Cabinet indicated its preference for Option 2 and an additional £300,000 was set aside for transitional costs which would include contacting service users and/or their next of kin to explain the impact of the change and provide information about alternative providers; exploring redeployment options for affected staff; and the termination period for Careline customers as per their contracts with the Council. An additional amount of £446,000 was also agreed to support other potential one-off costs. The updated February 2025 figures for Option 2 show no change, on the basis that it would be assumed that the YourStride contract would have been terminated, along with all other third-party contracts before ceasing the Careline service – although the recommendations in this report indicate a way in which this

one-off funding can potentially be utilised in an efficient way through the achievement of a smooth transition to an expanded Colchester Helpline service – as described elsewhere in this report.

In recognition that transfer of service-users and staff to the expanded service could take a number of months to complete, the recommendation provides for the revised projected cost-pressure for the whole of the 2025/26 financial year, funded as necessary through the aforementioned implementation budget already agreed by Cabinet and/or any carry-forward of the expected net favourable variance at the end of 2024/25 as discussed below.

Current budgetary performance

In November 2024, the report to Cabinet commented on the actual 'in-year' budgetary performance of Careline during the 2024/25 financial year. Based on the historic performance of the service, a sum of £296,000 was included within the 2024/25 budget to meet the on-going increased subsidy of the service whilst the review was undertaken. It also commented on the difficulty in estimating the actual net cost of extending the timescales for the review of Careline by three months into 2025/26 and moving the final implementation date from end of March 2025 to end of July 2025.

In terms of the financial position to date in 2024/25, and as mentioned earlier, there continues to be a reduced 'call on' this funding due to a period of increased income from the YourStride contract (prior to its termination) alongside reduced employee costs, which reflect on-going recruitment and retention issues. Although this may still look positive from a purely financial perspective, as set out elsewhere, it is not sustainable from a service provision position. It has however allowed some funding to be 'freed up' to support the potential additional cost of the proposed extension to the timescales into 2025/26.

Cost implications for the recommendation

As indicated above, continuing to provide the Careline service in its current form albeit on existing reduced staff levels and with no external third-party contracts to serve (Option 3/5) shows total ongoing annual subsidy of circa £275,000 (including a circa £50,000 budgetary cost pressure) along with a £287,000 one-off cost for digitisation and modernisation. Whilst there could be an opportunity to re-establish and expand Careline's business base to increase income, it would likely take a number of years to achieve a no-subsidy/profitable position – within which time it is expected that local government reorganisation may have already taken place.

In terms of the costs associated with ceasing the existing service through a managed transfer of service-users and staff to Colchester Helpline, as recommended, the one-off implementation budget of £746,000 that has already been agreed by the Cabinet could be used to cover associated transitional costs. The recommended approach offers the opportunity to make the most effective and efficient use of this funding – in particular by minimising the potential cost of

compulsory redundancy and the amount of resource needed to support a large number of individual service users to find alternative provision across a range of providers. If the Cabinet agrees the recommendations in this report, Officers would (with appropriate delegated powers) look to utilise the fund selectively with a view to keeping expenditure to a minimum.

It may be prudent to utilise a proportion of the fund to facilitate the digitisation and equipment upgrade for service users currently on outdated analogue equipment before it becomes a formal requirement and expectation of government in January 2027. This may be for TDC and Colchester Helpline to cooperate to achieve during the transition period and could take the form of a financial contribution to Helpline that could be offset against the Council's rental expectations for Helpline's use of Barnes House as an outpost for responders and/or the potential fee payable for outsourcing Out-of-Hours and CCTV to Helpline over the remainder of 2025/26 as discussed elsewhere in this report. Such an arrangement might assist in achieving a smooth transition, particularly having regard to the likelihood of future local government reorganisation and achieving best value for residents across a wider geography.

Given the on-going challenges associated with staff retention and recruitment, the use of external support has been essential to maintain the continuation of service throughout the current year. The cost of utilising such support from third-party private providers to ensure service continuity through the transition period would be required, which can be covered, in part through salary savings in the 2024/25 financial year and in part through the implementation budget, albeit with salary savings remaining subject to the outturn process at the end of March 2025.

Ongoing liabilities

The cost to the Council and to Tendring tax-payers of subsidising the Careline service at a time when other similar providers are operating on commercially viable basis within the market is clearly a concern for the ongoing financial sustainability of the Council – and one of the factors that supports the recommendation within this report to withdraw the existing service from the market. With that in mind, it will be important to ensure that exiting the market, as proposed, does not leave the Council with any long-term or ongoing financial, legal or other liabilities.

The recommended approach set out in this report is designed to ensure Tendring District Council can end the provision of the current Careline telecare, response and lifting service with customer contracts and staff transferring to Helpline. The intention would be for all customer and supplier contracts related to the provision of Careline ended, as necessary, within the 2025/26 financial year; funded as necessary through to termination utilising the one-off implementation budget.

The approach recommended is designed to minimise any risk of ongoing financial liability to the Council and passing all responsibility to Colchester Helpline for as many service-users and staff as possible – whilst retaining a degree of influence and scrutiny of service provision, as a partner to the North East Essex Health and Wellbeing Alliance; and thinking ahead to possible

local government reorganisation, where the merging of such services across the relevant authorities would have been a key strand of work.

Based on the current position and the proposed way forward, it is expected that all associated costs can be met from within existing budgets e.g. anticipated net underspends from 2024/25 that could be carried forward into 2025/26, the on-going base budget in 2025/26 and the one-off money previously set aside by Cabinet. Updates can be provided during 2025/26 as part of separate reports or as part of the regular financial performance reports as necessary.

YES | **The Section 151 Officer confirms they have been made aware of the above and any additional comments from them are below:**

There are no significant comments over and above those set out within the report. However, it is noted that the potential costs of the proposals, including the potential outsourcing of the CCTV and Out of Hours Service, can be met through existing budgets supported by flexibility within the proposed negotiations with Colchester Helpline.

It is also noted that the underlying principle of the proposed way forward is not necessarily a financial one, with the resilience of the service a key determinant given the on-going challenges of staff recruitment and retention. It is also noted that the proposals provide for an efficient use of existing budgets such as the one-off amount of £0.746m. Key value for money factors have therefore been recognised as part of the exploration of working with third party providers along with the transfer of financial risk / liabilities as necessary.

USE OF RESOURCES AND VALUE FOR MONEY

The following are submitted in respect of the indicated use of resources and value for money indicators:

A) Financial sustainability: how the body plans and manages its resources to ensure it can continue to deliver its services;	Full financial information was presented to the Cabinet in July 2024 for the five options and has been updated for this February 2025 report to take into account changes arising, mainly as a result of terminating the YourStride contract. The proposal of a smooth transition of service-users and staff to Helpline offers the opportunity to make most efficient use of the one-off implementation budget and minimise any ongoing liabilities.
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B) Governance: how the body ensures that it makes informed decisions and properly manages its risks; and	This is a Key Decision (of which notice was published on 8 January 2025). A range of options for the service have been considered in the Cabinet reports from July 2024, November 2024 and February 2025.
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<p>C) Improving economy, efficiency and effectiveness: how the body uses information about its costs and performance to improve the way it manages and delivers its services.</p>	<p>Full financial information was presented to the Cabinet in July 2024 for the five options and this has been revisited and updated for the February 2025 to reflect the impact of terminating the YourStride contract and a reduction in staff numbers. The recommended approach in this report would see financial liabilities transfer to another third party who will be in a position to deliver economies of scale in the provision of an expanded service for the whole of North East Essex. This approach aligns with government thinking around the achievement of economies of scale and the opportunities presented through local government reorganisation.</p>
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MILESTONES AND DELIVERY

If the Cabinet is minded to agree with the recommendations in this report, next steps are proposed in line with the following Indicative Transition Plan which, through more detailed discussions and collaboration with the Directors at Colchester Helpline, will evolve into a detailed and mutually agreeable programme. Key stages, for indicative purposes, are summarised and set out as follows:

Milestone Description	Planned Date
<p>Notification to service users, other third-party customers, staff and other interested stakeholders of the Cabinet's decision, outlining the intention and potential timetable for transfer to Colchester Helpline.</p>	<p>24 February 2025.</p>
<p>Notice of termination of remaining third-party contracts.</p>	<p>28 February</p>
<p>Enter into contract(s) with preferred third-party provider(s), as necessary, for on-call call handling and/or response/lifting support for the transition period.</p>	<p>3 March 2025</p>
<p>Commence negotiation of heads of terms for the legal agreement and detailed transition plan and preparation of detailed transition plan with Colchester Helpline which will address, amongst other requirements, the achievement of the following processes and milestones:</p> <ul style="list-style-type: none"> • confirmation of arrangements and agreement, in writing, of all associated obligations – including financial contributions and/or Barnes House accommodation; 	<p>21 March 2025</p>

- notification to service users, other third-party customers, staff and other relevant stakeholders confirming arrangements for transfer to Helpline – including the ability to ‘opt out’ of the transfer;
- deadline for service-user opt-out notification;
- contact with opted-out service users with details of other third-party providers and encouragement to seek alternative arrangements – with the offer of support;
- start of transfer of Careline Customer contracts to Colchester Helpline;
- end/termination of any remaining third-party customer contracts;
- confirmation of arrangements for transfer of staff to Colchester Helpline;
- completion of transfer of Careline staff to Colchester Helpline;
- establishment of Helpline outpost at Barnes House;
- transfer Out-of-Hours, CCTV and Sheltered Housing monitoring to Colchester Helpline;
- notification to Sheltered Housing Tenants of tenancy agreement changes;
- transfer of remaining ‘opted out’ service users to other third party providers or final notification of remaining customers that the TDC Careline service has ended;
- completion of transfer of Careline Customer contracts to Colchester Helpline; and
- termination of all remaining third-party supplier contracts.

Should any Cabinet decision be called in for scrutiny, all timescales may need to be adjusted accordingly which could result in an approximate addition of between four and six weeks.

The Trade Union will continue to be updated at all times on the review process including the potential impacts on staff and service users. It has offered support throughout the process.

ASSOCIATED RISKS AND MITIGATION

The main risks associated with the recommended approach in this report are highlighted as follows:

Further staff losses

The review of the Careline service and the subsequent extension of time to consider alternative options have unfortunately and understandably had a negative impact on the morale of staff operating at all levels within the service and uncertainty over the future has already resulted in a significant number of staff leaving and their posts remaining vacant – placing additional pressure on the staff that remain, and requiring ongoing support from third-party providers.

Whilst the recommendation to Cabinet and the decision it is being asked to take bring some clarity in respect of the future of the Careline service, some uncertainty for staff will still remain around how the transfer to Colchester Helpline will be achieved. There is a significant risk that some staff would prefer to find alternative work than wait for clarity around the process for transfer and that there could be further staff losses in the short-term that could impact on the Council's ability to provide the service in an effective way to its service-users during the transition period.

The mitigation measure proposed in this report is that the Council does enter into contractual arrangements with one or more third-party providers to ensure on-call casual cover for periods of staff shortage. It could be that Helpline, or the other providers that made submissions are amongst the companies that could provide this support for call-handing and/or response and lifting – but others could be called upon as necessary.

Drop in quality of service

Loss of staff and/or difficulties in ensuring cover over the transition period does present a risk that the quality of service to the Council's 1,500 individual service users, sheltered housing residents and other third-parties under contract could suffer – particularly in relation to physical response and lifting, if staff are not available. As above, the recommendation provides for third-party support being drawn upon during the transition period – but there is a risk of higher reliance on the emergency services while service-users are in the process of transferring to Helpline or finding other alternative providers.

Confusion or miscommunication to service users and the public

It will be important to have a very clear communication plan sitting alongside the transition plan

to ensure service-users and the wider general public are clear on what is happening to Careline and how the transfer to Helpline is proposed to work. Many service-users are vulnerable older people who could find the transition confusing or who rely on their next of kin to advise or make decisions on their behalf.

Whilst the recommended approach in this report is designed to minimise the confusion by facilitating a smooth transition of service-users to one preferred and trusted alternative provider, the Council will still need to give those service-users the ability to opt-out of that arrangement with clear guidance on what happens if that is the case.

The Council will need to work closely with the local press and media to ensure that no confusion or miscommunication is caused by any announcements on the future of Careline or reporting of those announcements. Whether Essex County Council election in May 2025 take place or not, there is heightened risk that the future of Careline and the experience of service-users transferring to Helpline becomes a political issue that might cause some negative press and public confusion. To manage that risk, all efforts will be made to ensure that ECC Division Members and TDC Members are briefed on key decisions around Careline and the implementation of the transition plan.

Reputational impact

Tending Careline has been the subject of review for more than 18-months in which time the Council has not been taking on any new service-users and has not been filling any staff vacancies that have arisen. The Council has reported publicly that the service has needed to be heavily subsidised at a time when other third-party providers have been able to offer similar services on the open market at competitive prices and in a profitable manner. The Council has also had to report that it has been servicing unviable contracts with third-party private suppliers that have been costing the tax-payer money and placing unmanageable pressure on the service and its staff.

In recent months, the Council has been losing staff and losing customers from Careline and has had to put urgent measures in place to address some of the issues faced, including the termination of the YourStride contract. The 2024 consultation exercise revealed that the uncertainty around the future of Careline was causing some concern amongst service-users; residents and staff and colleagues from Essex County Council and the North East Essex Health and Wellbeing Alliance have raised concern about the impact of the Careline review and the increase in the number of concerned residents seeking access to ECC's, already oversubscribed free service.

The Cabinet's decision in November to take additional time before confirming any final decisions on the future of Careline may have added to the uncertainty in some quarters, but has undoubtedly assisted in addressing the concerns raised by partners and has enabled time for positive discussions with Colchester Helpline and other third-party providers about the means of a smooth transition toward a potential exiting from the market. It has also allowed time for the

implications of the YourStride termination to be factored into updated financial assumptions for different options.

The recommendations in this report, if agreed by Cabinet, will not be welcomed by all with an interest in the future of Careline; and there will be some who would still prefer to see Careline continue. However, the recommended approach is considered to be a logical and justifiable response that addresses the outcome of last year's consultation.

Delay in negotiating/agreeing terms for the transfer

The recommendations in this report include delegated authority to the Portfolio Holder for Partnerships (in consultation with the Leader of the Council and Portfolio Holder for Finance and Governance; Director for Planning and Community; Monitoring Officer; s151 Officer; and Head of People) to progress the preparation of a detailed transition plan in collaboration with Colchester City Council and Colchester Helpline, including the associated legal agreement and specific tasks and timescales. If, for whatever reason, necessary negotiation and agreements do not progress in a positive, reasonable and timely manner, the achievement of the proposed transfer to Colchester Helpline could be delayed or prevented. In those circumstances, Officers will report any concerns to Members as expediently as possible and, if necessary, report back to Cabinet with advice and revised recommendations.

EQUALITY IMPLICATIONS

Section 149 of the Equality Act 2010 places a statutory duty (The Public Sector Equality Duty, "PSED") on the Council in the exercise of their functions and is applicable when making decisions to have due regard to the needs to:

- (a) Eliminate unlawful discrimination, harassment and victimisation and other behaviour prohibited by the Act. In summary, the Act makes discrimination etc. on the grounds of a protected characteristic unlawful.
- (b) Advance equality of opportunity between people who share a protected characteristic and those who do not.
- (c) Foster good relations between people who share a protected characteristic and those who do not including tackling prejudice and promoting understanding.

The protected characteristics are age, disability, gender assignment, pregnancy and maternity, marriage and civil partnership, race, religion or sexual orientation. The Acts states that notably, 'marriage and civil partnership' is not considered a relevant protected characteristic for advancing equality of opportunity (b) and fostering good relations.

Equality Impact Assessments ("EqIA") were conducted for each of the five options provided within the Cabinet report of 24 July 2024 and these have been updated and attached as Appendix 2. The updated Equality Impact Assessment identifies that the proposals outlined may

potentially affect both service users and staff, particularly in relation to disability and age. It was also identified that it would be crucial to address any associated impact through any proposed transitional arrangements, with the corresponding costs specified in the financial analysis within the July 2024 report. Several key principles will need to guide the approach, as follows:

- Feedback from service users as part of the consultation.
- The use of data to determine support for individual service users.
- To regularly review and update the Equality Impact Assessments as required.
- To ensure clear Communication to both Service Users and staff.

In proposing the route towards a smooth transition involving the transfer of as many service-users and staff as possible to a single trusted provider for the advantages set out elsewhere in this report – the above principles have been taken into account.

The recommended approach is a direct and positive response to the consultation feedback that takes into account the preference amongst service-users for continuity and certainty, a general willingness to transfer to an alternative trusted provider if necessary, a limited appetite amongst most to pay higher fees and the need for support to be provided through any transition.

The data held by the service enables the Council to have informed discussions with Helpline about the needs of and locations of existing service users and staff required to make an expanded service for North East Essex work in as smooth a way as possible.

The proposed approach aims to keep, to a minimum, the risk of vulnerable people being left unintentionally unable to access telecare and response services by pursuing an uncoordinated or piecemeal approach to finding alternative providers. A smooth transition of service-users to one trusted alternative provider, with links through Colchester City Council to the North East Essex Health and Wellbeing Alliance supports the objectives of that Alliance for an integrated health system approach that enables people to be looked after in their own homes, reducing pressure on the emergency services and reliance on the over-subscribed free services provided through Essex County Council – for which there is a long waiting-list.

Communication to service-users and staff will be key to delivering a successful transition, and the recommended approach has a stronger prospect of maintaining clear information and a clear narrative than would otherwise be the case for an uncoordinated or piecemeal approach to ceasing the service and signposting service-users to alternative providers.

Of note, as part of the recent consultation, the following question was asked:

Do you consider that you have a Protected Characteristic* as defined in the Equality Act (2010) that adversely affects your daily life?

**Age, gender reassignment, being married or in a civil partnership, being pregnant or on maternity leave, disability, race including colour, nationality, ethnic or national origin, religion or belief, sex, sexual*

orientation

The answer options were 'yes', 'no' and 'prefer not to say'. Of those who answered this question, 40% responded 'yes'. This further emphasises the importance of ensuring that an effective transition plan and associated support is developed to ensure that all service users and next of kin receive that support in a way which is suitable and, so far as possible, personalised, to meet their needs.

SOCIAL VALUE CONSIDERATIONS

Social Value is defined through the Public Services (Social Value) Act 2012 and requires all public sector organisations (and their suppliers) to look beyond the financial cost of a contract and consider how the services they commission and procure might improve the economic, social, and environmental well-being of an area.

This is not relevant to the proposed recommended Option 2, as the Council will not be commissioning or procuring services. It will however be facilitating a smooth transfer of service-users and staff to a single trusted alternative provider in Colchester Helpline whilst still offering an 'opt-out' for individuals so they have the ability to choose directly from a number of other alternative providers on the open market, who are experienced and competitive in delivering telecare services.

As set out elsewhere in this report, there are significant advantages to the approach recommended in this report – in particular the social value associated with an approach that supports the objectives of the North East Essex Health and Wellbeing Alliance for an integrated health system approach, continuity and security for existing Careline service users, opportunities for job retention and better value for money for tax-payers.

The approach aligns with the central government desire for local authorities to achieve better economies of scale in the provision of efficient services to the public and, with the possibility of local government reorganisation within the current parliament, it aligns with the logic of working closely with neighbouring authorities to combine services and achieve those economies of scale.

IMPLICATIONS FOR THE COUNCIL'S AIM TO BE NET ZERO BY 2050

Ceasing Careline's telecare and response and lifting services will reduce Tendring District Council's contribution to climate emissions as it will no longer require a fleet of vehicles for that purpose and will reduce the organisations use of petrol vehicles for the provision of services. However, naturally any third-party that takes on service-users and staff and seeks to grow its customer base within Tendring will have a carbon footprint.

By expanding its reach into Tendring, Helpline will need to expand its fleet and mileage in access Tendring residents on response. Furthermore, it is not Helpline practice to have as

many staff operating from home as Tendring Careline – and so there may be increases in vehicle movements getting staff to and from work.

Fundamentally however, by being a partner with Colchester City Council and the NHS through the North Essex Health and Wellbeing Alliance, the transfer for service-users and staff to Helpline does allow the Council to retain some influence in discussions about carbon emissions across Council and health services, including the sustainable use of property and use of cleaner vehicles. The Council would retain no influence over such matters whatsoever if all service users were moved to different open-market providers in an uncoordinated or piecemeal manner.

OTHER RELEVANT CONSIDERATIONS OR IMPLICATIONS

Consideration has been given to the implications of the proposed decision in respect of the following and any significant issues are set out below.

Crime and Disorder	N/A
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Health Inequalities	The service enables residents to maintain independent lives and there are a number of other providers offering comparable services. A focus of the North East Essex Health and Wellbeing Alliance is supporting communities in having more active and healthy lifestyles and moving towards a more integrated health system approach. The opportunity to explore the opportunity of a combined Careline service for North East Essex has the potential to support these aims and objectives and is therefore recommended to Cabinet as the approach to achieving its preferred Option 2.
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Subsidy Control (the requirements of the Subsidy Control Act 2022 and the related Statutory Guidance)	Since the legislation came into force in January 2023, public authorities must assess whether they are providing subsidies within the definition of the Act, which equates to financial assistance conferring an economic advantage to one enterprise over another. The October 2024 decision to terminate the YourStride contract addressed a specific instance where the Council had been subsidising a third-party contractor – as referred to in the November 2024 Cabinet report.
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	<p>Whilst the approach recommended in this report proposes the transfer of service-users and staff to a third-party, for the sound reasons set out in this report, it is not a proposal to fund or subsidise a third-party – with the exception of the financial contribution proposed for the digitisation of service-users’ equipment (which would be a cost incurred by the Council in any event if it were to continue the service).</p> <p>The proposed approach may identify a preferred enterprise (i.e. Colchester’s Helpline Service provided by Amphora), but the reasons for this are clearly set out in this report and this approach is not to the exclusion of other third-party providers who will be called upon to support the Council through the transition period, on commercial terms, and who can offer service to any customers that choose to opt out of an automatic transfer to Helpline.</p>
<p>Area or Ward affected</p>	<p>All</p>

PART 3 – SUPPORTING INFORMATION

BACKGROUND

On 26 July 2024, the Cabinet was presented with the findings of a 12-month review of the Council’s Careline service along with five potential options for its future, each with different financial, equality and other implications. At that meeting, the Cabinet resolved to agree, in principle, a preferred option (Option 2) to cease the telecare and lifting/response provision of the Careline Service in its entirety, including service delivery under third-party contracts - with remaining service provision solely relating the Council’s Out-of-Hours and CCTV service. The Cabinet agreed however that consultation would be carried out with customers, residents and other stakeholders before any firm decisions were taken.

That consultation was carried out based upon the need to balance best value principles with the needs of existing customers, who now had a wider range of options available on the open market, at more comparable rates than the Council could continue supplying the service for.

The results of the consultation carried out in between 19 August and 30 September 2024 were reported to the Cabinet at its meeting on 15 November 2024. Having considered those results, the Cabinet confirmed that it still wished to continue, in principle, with preferred

Option 2; but that a final decision would not be taken until February 2025 to allow time for Officers to give further consideration to proposals submitted by third parties through the consultation, indicating an interest in potentially taking on all or part of the Careline service.

Accordingly, this report provides an update on the exploration of those third-party proposals as well as an updated recommendation for a final Cabinet decision on the future of Careline informed by updated financial analysis and with an indicative transition plan (as reported above).

EXPLORATION OF THIRD-PARTY PROPOSALS

In line with the Cabinet's decision in November 2024, Officers have been exploring proposals from third-party providers of telecare, response and lifting services that expressed an interest in taking on all or part of the service if it were decided that the service would be ceased.

This exploration of proposals has been approached, not with the view to procuring a third-party for the purposes of outsourcing the service, or part of that service and thus paying revenue to that body; but to seek an appropriate and trusted third-party willing to expand its existing business to take on service-users and staff through a managed transition that will relieve the Council of current costs and liabilities whilst providing security and continuity for service-users and staff that are able to transfer into that business. This is therefore not a formal procurement tender process, but an exploration of which third-parties are interested and which could be best placed to fulfil that role.

Three propositions were received before the Cabinet's agreed deadline of 16 December 2024 including that from Colchester City Council's 'Helpline' (provided through Amphora). All three have provided support for Tendring Careline service-users in one form or another; or are otherwise active in providing direct services to residents in Tendring on a commercial basis.

The two other third-party private providers use the same call-handling technology and software as Tendring Careline and would be very well placed to support Careline in handling calls on an immediate, casual or temporary basis during times of staff-shortage, with the ability to operate remotely and from home, as do many Tendring staff, utilising that technology. Helpline, in contrast, uses different call-handling technology and software and is less well placed to provide any immediate, casual or temporary assistance for call monitoring, but its strengths are in the quality, resilience and robustness of its response and lifting service – with two staff on every response, positive average response times, and with all existing staff trained to do both call handling and response.

Furthermore, Helpline is owned by Colchester City Council which, in turn, is in a partnership with Tendring District Council and the NHS as part of the North East Essex Health and Wellbeing Alliance and there are advantages of the Helpline proposal, over the others, in offering the full transfer of existing Careline users on similar or existing terms and conditions

to Helpline and the potential transfer staff through a 'TUPE' or other arrangement that could protect local government terms and conditions. This approach would enable the expansion of Helpline to create of a combined service for the whole of North East Essex with a commitment to delivering quality service coverage for residents in every corner of the Tendring District. This would align neatly with the aims and objectives of the Alliance for an integrated health system approach that enables people to be looked after in their own homes, reducing pressure on the emergency services and reliance on the heavily-subscribed free services provided through Essex County Council – for which there is a long waiting-list.

The other providers, to their credit, also offer the potential to take on service-users and staff through a formal arrangement to provide a quality service; but because they are wholly owned private companies falling outside of the public-sector Alliance partnership, there can be less assurances and less local authority influence over the long-term standard of service and effective deployment of staff resources to provide continuity and familiarity to service-users at a local level. It should however be noted that one of the interested providers only offer a call-handling service whereas the other, like Helpline, offers both call-handling and response. These private companies and others like them do play an extremely important role providing telecare, response and lifting services in Tendring, with an increasingly ageing population; and will have benefited from the opportunities to sign up new customers in the period since the start of the Council's Careline review when TDC stopped taking on new service users.

However, in the interest of ensuring a smooth transition for Careline's existing service-users, continuity of terms and conditions and opportunities for staff retention whilst best supporting the aims and objectives of the North East Essex Health and Wellbeing Alliance, it is recommended that the Helpline proposition offers the best permanent solution – albeit the other two providers that made submissions, and potentially other private providers have the potential to provide valuable immediate, casual and temporary support under contract during any transition period, particularly for call-handling.

An enlarged Helpline service would be achieved in a financially sustainable way through economies of scale with no ongoing financial liability for Tendring District Council, but with the retention of some influence and oversight over the quality and coverage of the service through the Alliance partnership. Furthermore, with the strengthening of relationships between local authorities in the run-up to, and following the publication of the Government's Devolution White Paper and ongoing emergence of details of potential local government reorganisation, there is a logic in reinforcing the role of the North East Essex Health and Wellbeing Alliance and exploring opportunities to achieve economies of scale across local authority lines when they present themselves.

The principal recommendation within this report therefore is that the Council does work with Colchester City Council as part of the Alliance to achieve a managed transfer of Tendring Careline service users and Careline staff to an expanded Colchester Helpline service, at which point Careline's telecare, response and lifting service in its current form will cease.

It is proposed however that the Council separately enters into contracts with one or more third-party providers (which could include the three considered above) to provide temporary support for both call handing and response/lifting over the transition period in order to maintain continuity of service for remaining service-users at a time when the Council could lose further staff. This will follow on from a quotation exercise carried out by Officers aimed at ensuring best value for money.

OUT-OF-HOURS, CCTV AND SHELTERED HOUSING

As well as handling calls from Careline customers, the operating staff also cover the Council's Out-of-Hours and CCTV service. Since the July 2024 Cabinet report, the preferred Option 2 has envisaged ceasing the telecare, response and lifting element of the Careline service whilst retaining the Out-of-Hours and CCTV service, however Officers have now gained a better understanding of some of the complex practical implications of taking that approach for services across the Council.

The Council deals with approximately 550 out-of-hours calls a month on average unrelated to the Council's Careline Service, but which can cover a wide range of matters from sheltered housing to emergency planning. At present it is the call-handling staff within Careline that handle the initial contact, referring callers to particular on-call Officers within relevant services as necessary. However, some out-of-hours calls can raise unusual and complex matters and it might not always be possible to get hold of on-call Officers straight away. Therefore, Careline staff with their familiarity of the Council, the district and its residents can sometimes deal with out-of-hours issues over an extended period, providing added value in making follow-up calls to assist in finding a resolution and making accurate and useable notes for the services to pick up the following morning.

However, because out-of-hours calls make up a relatively low proportion of total calls received through Careline, retaining an out-of-hours service within the Council would only require a small number of staff, working shifts to ensure sufficient coverage, handling a very low-number of calls. Given existing difficulties in recruiting and retaining staff to work unsociable hours, the statutory duties around sheltered housing and the need at all times for the Council to work as efficiently as possible and make best use of resources to give best value to Tendring residents, there are serious questions about retaining a small team for solely out-of-hours purposes represents the most effective approach. However, there would equally be concerns in out-sourcing out-of-hours coverage to a third-party and maintaining the quality of care that Careline currently offers thanks to its knowledge of the organisation and the district.

With the prospect of local government reorganisation however, the potential to work with Colchester City Council to align services and achieve economies of scale gives heightened justification for exploring, in more detail, the possibility of transferring or effectively outsourcing the Out-of-Hours and CCTV service to Colchester within the transition period for

the merging of Careline with Helpline.

Helpline is likely to offer the most cost-effective solution, but unlike for Careline telecare, response and lifting services, Out-of-Hours would be provided as an outsourced 'paid for' arrangement. However, with local government reorganisation, the merging of these services is likely to happen by default and there is a logic in seeking to achieve the transfer of Out-of-Hours/CCTV as part of the transfer of Careline to Colchester Helpline. This will assist in achieving viability and economies of scale for a combined service and supports the proposal for transferring staff. The transfer of Out-of-Hours, CCTV and Sheltered Housing Monitoring to Colchester Helpline through an outsourcing arrangement therefore also forms part of the recommendation in this report.

PREVIOUS RELEVANT DECISIONS

26 July 2024: Cabinet: Report of the Partnerships Portfolio Holder - A.8 - Tendring's Careline Service Review Decision: RESOLVED that Cabinet –

(a) notes the outcome of the review of the service as set out in the Portfolio Holder's report (A.8) and its appendices and agrees the decision, in principle, to adopt Option 2, that is to cease the telecare and lifting/response provision of the Careline Service, in its entirety, including service delivery under third-party contracts and that the remaining service provision will solely relate to the Council's Out-of-Hours and CCTV service;

(b) approves the necessary consultation to be undertaken with customers, residents and key stakeholders. This consultation to be based upon balancing best value principles with the needs of the Council's existing customers, who now have a wider range of options available on the open market, at more comparable rates than the Council can continue to supply the service for;

(c) delegates the format and design of the consultation to the Leader of the Council and the Portfolio Holder for Partnerships, in consultation with the Assistant Director (Partnerships) and the Assistant Director (Governance);

(d) agrees the Communication and Engagement Plan with an overriding objective to encourage and support active engagement with services users to understand the principles of Option 2 and the alternative providers available, as well as understanding why Option 2 is the preferred option;

(e) requests that the outcome of the consultation be reported back to the Cabinet in either October or November 2024, for a decision as to the future provision of Careline Services (telecare/lifting/response service), which will include a detailed transition plan as necessary; and

(f) subject to the associated funding being agreed as part of report item A.9 elsewhere on the

agenda, sets aside a total budget of £0.746m to meet the potential implementation costs.

Reasons for Decision: Cabinet was satisfied that:-

(i) given the changing market context, the recommendations of the Portfolio Holder were based on what was considered to be the best option for both service users and the Council;

(ii) several other providers on the open market offered a like for like service, at a comparable price. Furthermore, Essex County Council provided a free of charge service, if a resident was referred to them through a statutory provider, such as Adult Social Care or a health care provider; and

(iii) it was also important to highlight the continuing capacity challenges the Authority faced in meeting the needs of a range of service users, including those supported by third party contractual arrangements.

25 October 2024: Decision by the Leader of the Council: A decision by Leader of the Council and Corporate Finance & Governance Portfolio Holder on 25 October 2024: Termination of Tendring District Council's Supply of Services Agreement with AE Partners Ltd (trading as 'YourStride') in respect of services provided by the Council's Careline staff

Decision:

(a) following consultation with the Section 151 and Monitoring Officers, to make an urgent decision, on behalf of the Cabinet, to authorise immediate notice being served on AE Partners Ltd giving 16 weeks prior notification to terminate the Supply of Services Agreement between them and the Council;

(b) that the Directors for Governance and of Planning and Communities be authorised to take the necessary administrative steps to enable this decision to be implemented as soon as possible and without further delay to the Council; and

(c) notification of such decision will be reported to Members accordingly.

15 November 2024: Cabinet: Report of the Partnerships Portfolio Holder – A.11. Tendring District Council's Careline Service Review: Results of consultation and next steps Decision: RESOLVED that Cabinet –

(a) notes the outcome of, and feedback from, the recent customer, resident and stakeholder consultation on the future of Tendring Careline – that was based upon balancing best value principles with the needs of our existing customers, who now have a wider range of options available on the open market, at more comparable rates than the Council can continue supplying the service for;

(b) notes the decision to terminate the third-party contract with AE Partners Ltd (YourStride) which, irrespective of the Cabinet's resolution in respect of (d) below, will reduce the pressure

on the capacity of Tendring Careline – which, for some months, has been dealing with a growing and increasingly unmanageable volume of calls from residents outside of Tendring; and bring about a cost saving to the Council;

(c) authorises the Director of Planning and Communities, in consultation with the Leader of the Council and the Portfolio Holder for Partnerships, to review and if necessary, vary or terminate other third-party contracts at suitable timely junctures as part of the move towards the fulfilment of any final preferred approach;

(d) confirms that, having considered the contents of this report, it still wishes to continue, in principle, with the preferred option (Option 2) of ceasing the telecare and lifting/response provision of the Careline Service, in its entirety, including service delivery under third-party contracts with remaining service provision solely relating to the Council's Out-of-Hours and CCTV service – albeit subject to (e) below;

(e) authorises the Director of Planning and Community, in consultation with the Leader of the Council and the Portfolio Holder for Partnerships, to explore further the third-party proposals that were submitted to the Council through the consultation;

(f) subject to (e) above, requests that third parties be invited to put forward a formal detailed proposal for further exploration within one month of this decision (i.e. by close of business on Monday 16th December 2024) as the starting point for Tendring District Council's consideration;

(g) requests that the Portfolio Holder for Partnerships reports to Cabinet in February 2025 to provide an update on the opportunity explored in line with (e) above in respect of the third-party proposals, as well as an updated recommendation for a final Cabinet decision on the future of Careline informed by updated financial analysis and with a detailed transition plan;

(h) subject to (g) above, acknowledges that there may be additional costs arising from the change in timescales set out in this report, and requests that the financial impact is included within the report to Cabinet in February 2025; and

(i) authorises the Director of Planning and Community in consultation with the Leader of the Council and the Portfolio Holder for Partnerships, to assess different options for the continued provision of the Out-of-Hours and CCTV service and to implement any necessary changes, as necessary, following the Cabinet's final decision on the future of Careline.

Reasons for Decision: Cabinet was satisfied that:-

(i) given the changing market context, the recommendations of the Portfolio Holder were based on what was considered to be the best option for both service users and the Council;

(ii) several other providers on the open market offer a like for like service, at a comparable

price. Furthermore Essex County Council provides a free of charge service, if a resident is referred to them through a statutory provider, such as Adult Social Care or a health care provider;

(iii) it was important to highlight the continuing capacity challenges the authority faces in meeting the needs of a range of service users, including those supported by third-party contractual arrangements;

(iv) feedback from the recent customer, public and stakeholder consultation presented alternative approaches that warranted more detailed and proper consideration for which additional time needed to be incorporated into the programme and next steps in order for that consideration to take place; and

(v) it was necessary to factor in the full implication of terminating the YourStride contract when carrying out any further work along with any changes that might need to be made to other third-party contracts.

BACKGROUND PAPERS AND PUBLISHED REFERENCE MATERIAL

Cabinet Report 26 July 2024

Cabinet Report 15 November 2024

APPENDICES

1. Updated financial analysis
2. Updated Equality Impact Assessment (EqIA)

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A.8 APPENDIX 2: Updated Equality Impact Assessments

A review of the Careline service has been carried out and multiple options have been considered. The table below summarises the impact each option could have on service users, staff and the Council. This is updated from the version presented to the Cabinet in July 2024 to include assessment of the recommended approach in the February Cabinet report (transfer of service-users and staff to and expanded Colchester Helpline service) and the alternative option (3/5) referred to in the report for retaining the Careline service with fewer staff and no external contracts.

General actions for all Options

- Monitor service user feedback and satisfaction surveys.
- Monitor staff morale and provide support for staff who require it.
- Conduct meetings with staff and management to explain the process going forward and provide an update on the review conducted so far.
- Union engagement in the process.
- Employee Assistance Programme offered to all staff.
- Regular communication with service users.

Title of Activity	Type & Purpose of Activity	How will the activity impact on people?	Who will be affected by Activity	Impact on Protected Characteristics	Evidence	Impact on people's health and well being	Specific Actions for this Option
Option 1 – Maintain Current position	Maintain current position – no changes are made to the current structure or duties performed.	It is intended that the service will continue without changes, therefore, no consultation would be required for this option, as there is no effect on the service provided.	No one will be affected since there will be no changes to the service.	All areas are neutral.	The Careline service users provide their personal circumstances and medical history to current records held on service users and staff. This would not be affected by continuing with the service.	There would be a minimal impact on people's health and wellbeing.	No addition to general actions above.

Title of Activity	Type & Purpose of Activity	How will the activity impact on people?	Who will be affected by Activity	Impact on Protected Characteristics	Evidence	Impact on people's health and well being	Specific Actions for this Option
<p>Option 2 – provide Out of Hours service only</p>	<p>Provide an Out-of-hours service only. This option also includes continuation of CCTV monitoring.</p>	<p>There are 1,500 service users who use the call monitoring and responding/lifting service. Less staff would be required to undertake the reduced service. By changing to out-of-hours only 1,500 Careline users, would be impacted as they would need to switch to an alternative provider. All third party contracts would need to be terminated and services transferred to an alternative provider, ensuring a smooth transition from one provider to another.</p>	<p>Service users and staff.</p>	<p>Negative impact on some service users due to their disability and age. Service users lack of support from next of kin, friends, or neighbours' family members. Known ill health or dementia. Potential negative impact on some staff due to their age/disability, due to ability to be redeployed into a suitable alternative role. There is a neutral impact on other protected characteristics.</p>	<p>Current records held on service users enable the team to identify who might need additional help during the consultation process and when transferring to an alternative provider. Service Users - Breakdown in age ranges Up to 60 = 80 61-70 = 190 71-80 = 500 81-90 = 800 Over 90 = 400 Staff encouraged to contact Careline managers, HR or the union for support.</p>	<p>This option could potentially impact service users by causing stress and anxiety, having to change service providers. Impact on staff morale during the reduction of the Careline service, to out of hours only, due to potential loss of income. If Option 2 is still the preferred option, following consultation, HR support would include a focus on redeployment opportunities.</p>	<p>In addition to the general actions above, identify service users who might need additional support, including those who have no next of kin. Identify service users who might need additional help transferring to an alternative provider and support. Make sure to provide staff with effective and robust support. An additional fund (£300k) has been included in the budget to support the transition. Monitor the contact made with service users to ensure everyone has the right information provided to make an informed choice of alternative provider based on their personal needs and circumstances.</p>

Title of Activity	Type & Purpose of Activity	How will the activity impact on people?	Who will be affected by Activity	Impact on Protected Characteristics	Evidence	Impact on people's health and well being	Specific Actions for this Option
Option 3 – change in working pattern	Option 3 of the Careline review is to change the working pattern of staff and return to 6 hourly shifts for both control operators and responders. Reduce need to pay for breaks, as only working 6 hours per shift.	Reducing the working pattern may help address the current difficulties in covering shifts. Easier to locate replacements - shifts will be less hours when cover is needed.	Staff.	All areas are neutral, apart from potential negative impact on some staff due to their disability e.g. mental health. Protected pay in place for 1 year. Reduced at 25% every 3 months. Financial impact on staff after protected pay has ended.	Current staff records enable the team to identify whether staff with a history of mental health may need additional support during the process. Staff encouraged to contact Careline managers, HR or the union to discuss any concerns.	This option could potentially have a financial impact on staff, which in turn could cause stress and anxiety.	In addition to the general actions above, ensure all staff are provided with effective and robust support. Managers and HR will offer support if any staff are experiencing stress and anxiety.
Option 4 – removal of responder and lifting service.	Option 4 is the removal of the responder/lifting service.	The responder /lifting element of the service would no longer be provided. Careline would offer a Telecare only service. If medical assistance was required, Careline would either call an ambulance or notify the next of kin or nominated contact.	Service users. Staff.	Negative impact on some service users due to their disability and age. Some service users who rely on this element of the service to remain in their home would have to consider changing to another provider or being removed to a care facility. Potential negative impact on some staff due to their age and disability. Redeployment of responder staff would need to be considered or	Current records held on service users enable the team to identify who might need additional help during the consultation process and if transferring to an alternative provider. Current records on staff enable the team to identify whether staff may need additional support through the process. Staff encouraged to contact HR, Union or Managers if they are concerned	This option could potentially impact service users by causing stress and anxiety. This option could Potentially have a Financial impact on staff, which in turn could cause stress and anxiety.	In addition to the general actions above, identify service users who might need additional support and assistance during the consultation process, including those who have no next of kin. Make sure to provide staff with effective and robust support. To provide alternative employment within TDC if appropriate. Redundancies are a last resort.

				<p>staff would need to be absorbed into other duties within the Careline service if appropriate. The other protected characteristic groups would have a neutral impact.</p>	<p>about the proposed changes to service delivery.</p>		<p>Identify staff who might need additional support during the process. Encourage staff to contact HR, Union or managers if concerned. An additional fund (£300k) has been included in the budget to facilitate the smooth transition for staff and service users.</p>
Title of Activity	Type & Purpose of Activity	How will the activity impact on people?	Who will be affected by Activity	Impact on Protected Characteristics	Evidence	Impact on people's health and well being	Specific Actions for this Option
<p>Option 5 – Termination of third party contracts and cessation of the TSA accreditation.</p>	<p>Option 5 is to terminate all third party contracts and cessation of the TSA accreditation.</p>	<p>Careline customers could be affected by Option 5, as this would mean the removal of the responding TSA accreditation. Users would need to be consulted on this to inform them of their options to transfer to an alternate provider if they wish to.</p>	<p>Service users. Staff.</p>	<p>Negative impact on some service users due to their physical and mental capacity and age. Lack of support from family, friends, neighbours care facility. The other protected Characteristic groups would have a neutral impact.</p>	<p>Current records held on service users enable the team to identify who might need additional help during the consultation process and when transferring to an alternative provider.</p>	<p>This option could potentially impact service user by causing stress and anxiety having to change service providers.</p>	<p>In addition to the general actions above, identify service users who might need additional support and assistance during the consultation process, including those who have no next of kin. An additional fund (£300k) has been included in the budget to enable this process to be supported for those individuals that require additional help and support.</p>

Title of Activity	Type & Purpose of Activity	How will the activity impact on people?	Who will be affected by Activity	Impact on Protected Characteristics	Evidence	Impact on people's health and well being	Specific Actions for this Option
<p>Recommended approach – Transfer to Colchester Helpline</p>	<p>Transfer of Careline service-users and staff to expanded Colchester Helpline Service along with out of hours service. Termination of third-party contracts.</p>	<p>No practical disruption to the service provided to existing Careline service-users and no changes to terms and conditions. They would however need to be given the opportunity to opt-out of the transfer. Those who choose to opt out, may require support in finding alternative providers. All third party contracts would need to be terminated and services either transferred or signposted to an alternative provider (which could potentially be Colchester Helpline), ensuring a smooth transition from one provider to another.</p>	<p>Service users. Staff.</p>	<p>All areas are neutral.</p>	<p>The Careline service users provide their personal circumstances and medical history to current records held on service users and staff. This would transfer to Colchester Helpline which will expand its reach to serve those residents and take on Careline's current staff.</p>	<p>For Careline service users, there would be a minimal impact on people's health and wellbeing, with potential improvement in quality of service owing to Colchester Helpline's policy of have two responders on every visit. This option could potentially impact service user served through terminated third-party contracts by causing stress and anxiety having to change service providers.</p>	<p>As identified in indicative transition plan within Cabinet report. Notification to service-users and staff of intended transfer, and option given for people to opt out. Detailed transition plan to be agreed with Colchester. Termination of remaining third-party contracts. Support and advice provided for service-users and staff who opt out of the transfer. Support and advice provided to all staff through the transition period.</p>

Title of Activity	Type & Purpose of Activity	How will the activity impact on people?	Who will be affected by Activity	Impact on Protected Characteristics	Evidence	Impact on people's health and well being	Specific Actions for this Option
<p>Alternative Option 3/5 – Maintain Careline service with no external contracts and reduced staff numbers.</p>	<p>Combination of Options 3 and 5 involving terminating all third-party contracts and reducing the size of the permanent staffing structure to reflect current staff numbers.</p>	<p>Reduced number of calls and pressure on call-handling staff following termination of third-party contracts. Lower staff numbers will however make the service less resilient to staff loss or staff shortage, which could have an impact on quality and speed of response to service-users.</p>	<p>Service users. Staff.</p>	<p>Negative impact on some service users due to their physical and mental capacity and age. Lack of support from family, friends, neighbours care facility. The other protected Characteristic groups would have a neutral impact.</p>	<p>Current staff records enable the team to identify whether staff with a history of mental health may need additional support during the process. Staff encouraged to contact Careline managers, HR or the union to discuss any concerns.</p>	<p>This option could potentially impact service user served through terminated third-party contracts by causing stress and anxiety having to change service providers.</p>	<p>In addition to the general actions above, identify service users who might need additional support and assistance during the consultation process, including those who have no next of kin. An additional fund (£300k) has been included in the budget to enable this process to be supported for those individuals that require additional help and support. In addition to the general actions above, ensure all staff are provided with effective and robust support. Managers and HR will offer support if any staff are experiencing stress and anxiety.</p>