

DIRECT PAYMENTS

Project		Implementation of Direct Payments			Current Date		14/04/2026		
Lead		Hannah Roan/ Melanie Blake							
Overarching or phase related	Area	KEY ACTIVITIES	DP Framework Step	Lead	Actioner	Master timeline		RAG STATUS	Update
						START	FINISH		
Project Management	Internal governance arrangements	Set-up internal T&F Group with agreed Terms of Reference		Hannah Roan	Melanie Blake	02-Nov-25	08-Nov-25	Completed	T&F Group 1st meeting on 24/11/25. Monthly meetings in place
		Set-up RAID Log		Melanie Blake	Melanie Blake	02-Nov-25	08-Nov-25	Completed	RAID log developed
		Invite Legal/ Governance lead to join T&F Group		Hannah Roan	Hannah Roan	24-Mar-26	27-Mar-26	Completed	Following feedback from PFC in March 2025, Q&S rep to be invited to meeting. Hazel Lloyd nominated Rebecca Nix. Rebecca invited to April's meeting
	National Workstreams	Provide nominations from SBUHB for national T&F groups		Hannah Roan	Melanie Blake	01-Dec-25	31-Dec-25	Completed	Nominations shared with Judith Hill on 08/01/2026
	Reporting	Routine updates on implementation to CHC Programme Board and escalation of risks		Hannah Roan	Melanie Blake	01-Jan-26	31-Mar-27	Ongoing	Next report due 29/04/26
Routine updates to Performance & Finance Committee			Hannah Roan	Hannah Roan	01-Jan-26	31-Mar-27	Ongoing	Focused report on DPs presented to PFC on 24/03/26. Members requested regular updates from April 2026. Next report on 28/04/26	
Documentation/ policies	Application form	Development of national application form	Step 1: Making contact and getting Clear Information	Judith Hill	Amanda Davies	01-Jan-26	31-Mar-26	Completed	Draft received 09/03/26. Final version received 01/04/2026.
		Development of local electronic version of application form	Step 1: Making contact and getting Clear Information	Melanie Blake	Melanie Blake	01-Apr-26	14-Apr-26	On Track	Draft received 09/03/26. Final version received 01/04/2026.
		Seek Info Governance advice/ endorsement of use of electronic form via Microsoft Forms	Step 1: Making contact and getting Clear Information	Judith Hill	Amanda Davies	01-Jan-26	31-Mar-26	On Track	
	Holding Letter	Development of national holding letter	Step 1: Making contact and getting Clear Information	Judith Hill	Amanda Davies	01-Jan-26	31-Mar-26	Completed	Draft received 09/03/26. Final version received 01/04/2026.
		Add SBUHB details to holding letter	Step 1: Making contact and getting Clear Information	Melanie Blake	Daniel Owen	07-Apr-26	21-Apr-26	On Track	
	Eligibility & Suitability Checklist	Development of national checklist	Step 2: Understanding the person's health and wellbeing needs	Judith Hill	Amanda Davies	01-Jan-26	31-Mar-26	Completed	Draft received 09/03/26. Final version received 01/04/2026.
	Advice and Support Specification	Development of national service specification	Step 5: Organising Care & Support	Judith Hill	Melanie Blake	01-Jan-26	31-Mar-26	Completed	Draft received 09/03/26. Final version received 01/04/2026.
		Development of SLA for provider of Advice, Support & Co-ordination for DP	Step 5: Organising Care & Support	Judith Hill	Melanie Blake	01-Jan-26	31-Mar-26	Completed	Draft received 09/03/26. Final version received 01/04/2026.
	Personal Assistance Training	Development of national service specification	Step 5: Organising Care & Support	Judith Hill	Allyson Hazel	01-Jan-26	31-Mar-26	Completed	Draft received 09/03/26. Final version received 01/04/2026.
		Development of SLA for provider of PA Training	Step 5: Organising Care & Support	Judith Hill	Melanie Blake	01-Jan-26	31-Mar-26	Completed	Draft received 09/03/26. Final version received 01/04/2026.
	Roles and responsibilities	Development of national guide on roles & responsibilities setting out expectations for Pas and Registered Nurses depending on the	Step 5: Organising Care & Support	Judith Hill	Allyson Hazel	01-Jan-26	31-Mar-26	Completed	Draft received 09/03/26. Final version received 01/04/2026.
	Care Plan	Development of national template for Care Plan	Step 4: Developing a personalised care and support plan	Judith Hill	Amanda Davies	01-Jan-26	31-Mar-26	Completed	Draft received 09/03/26. Final version received 01/04/2026.
		Localise national care plan template	Step 4: Developing a personalised care and support plan	Melanie Blake	Melanie Blake	01-Apr-26	30-Apr-26	On Track	SBU logo to be added and embedded into SOP
	Recipient Contract	Development of national contract between HB and the recipient setting out roles and responsibilities.	Step 5: Organising Care & Support	Judith Hill	Melanie Blake	01-Jan-26	31-Mar-26	Completed	Draft received 09/03/26. Final version received 01/04/2026.
	Financial monitoring	Development of financial monitoring and audit return template	Step 3: Working out the amount of money available	Judith Hill	Martin/ Richard Mug	01-Jan-26	31-Mar-26	Completed	Draft received 09/03/26. Final version received 01/04/2026.
	Recruitment	Development of national job description and personal specification for CHC DP Co-ordinator	Step 5: Organising Care & Support	Judith Hill	Amanda Davies	01-Jan-26	31-Mar-26	Completed	Draft received 09/03/26. Final version received 01/04/2026.
Insurances	Development of Insurance and Employee Liability Insurance Guidance	Step 5: Organising Care & Support	Judith Hill	Amanda Davies	01-Jan-26	31-Mar-26	Completed	Draft received 09/03/26. Final version received 01/04/2026.	
Internal Processes	SOP	Development of local SOP outlining processes and roles/ responsibilities of SBUHB teams in the DP process. Embed national documents into local SOP	Step 5: Organising Care & Support	Hannah Roan	Melanie Blake	01-Mar-26	30-Apr-26	On Track	SOP drafted. On agenda for CHC Programme Board for approval on 29/04/26.
	End to end testing of first DP case	Identify and support first live DP case using agreed SOP. Capture learning and update SOP, templates or guidance to reflect		Amanda Davies	Commissioning/ Finance	01-Apr-26	31-May-26	Not due	
	Workforce impact	Assess impact of DP demand on coordination, finance and review capacity	Step 4: Developing a personalised care and support plan	Hannah Roan	Commissioning / finance	01-Jul-26	01-Aug-26	Not due	
	Reviews	Define DP review frequency and review triggers	Step 6: Monitoring & Review	Amanda Davies	Commissioning/ Nursing	01-May-26	31-May-26	Not due	
	DP Database	Development of DP log for all DP applications- to be held centrally by Commissioning Team	Step 1: Making contact and getting Clear Information	Hannah Roan	Melanie Blake	18-Mar-26	01-Apr-26	Completed	DP Database created. Ready for 1st request to be received
External funding	Utilisation of £100k non-recurring Welsh Government funding	Service Groups to develop proposals for resources they need to implement DP	Step 5: Organising Care & Support	Craige Wilson/ Dermot Nolan	Amanda Davies/ Colin Jones	01-Jul-26	01-Aug-26	Not due	Need requests to be submitted in order to test process, understand gaps etc.

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		Consider proposals and develop HB wide proposal for utilisation of the funding	Step 5: Organising Care & Support	Hannah Roan	Hannah Roan	01-Aug-26	31-Aug-26	Not due	
		Present case to CHC/ Complex Care Programme Board for approval	Step 5: Organising Care & Support	Hannah Roan	Melanie Blake	01-Sep-26	30-Sep-26	Not due	
Commissioning	External support for advice, support and financial transaction of DP	Liaise with LAs regarding piggybacking on to their current DP infrastructure/ process	Step 5: Organising Care & Support	Melanie Blake	Melanie Blake	01-Jan-26	28-Feb-26	Completed	Multiple meetings have taken place with Swansea and NPT LA regarding the support they could provide SBU.
		Receive financial proposal from LAs	Step 5: Organising Care & Support	Hannah Roan	Melanie Blake	01-Mar-26	31-Mar-26	Completed	Despite initial enthusiasm, Swansea LA were less keen to support after having sight of the draft service specification developed via the national workstream. Quote of £80k - £100K per annum received in order for the LA to provide baseline capacity, plus additional per-case costs applied once agreed activity thresholds are exceeded.
		Liaise with external provider via national workstream to understand the support they can provide the HB in managing DPs	Step 5: Organising Care & Support	Hannah Roan	Melanie Blake	01-Mar-26	31-Mar-26	Completed	Meeting took place with Dewis on 10/04/2026. Service specification to be shared in order for Dewis to prepare a costed proposal based on spot purchasing until the HB has a clear understanding of demand.
		Seek procurement advice on the proposed model	Step 5: Organising Care & Support	Hannah Roan	Hannah Roan	01-Apr-26	21-Apr-26	On Track	Emailed Judith Hill as national programme lead on 10/04/26 to ask whether national procurement team has been engaged with and what their advice was on direct awarding to external company for spot purchasing or whether tender exercise would be required.
		Take paper on proposed model to CHC Programme Board for endorsement	Step 5: Organising Care & Support	Hannah Roan	Melanie Blake	29-Apr-26	29-Apr-26	On Track	Paper to be presented to April's CHC/Complex Care Programme Board with proposed service model
Training	HB Staff Training	Run test case to understand training requirements for nursing staff to support DP assessment and review process. Set up training sessions.		Amanda Davies	Amanda Davies/ Gareth Bartley	01-Mar-26	30-Apr-26	On Track	LTC team have held a number of workshops to work through the process. Further testing to be undertaken with real life case when received which is likely to result in refinement of processes and identification of gaps/ resources
	PA Training	Explore options for PAs to receive core training	Step 4: Developing a personalised care and support plan	Hannah Roan	Melanie Blake	01-Apr-26	30-Apr-26	On Track	Emailed Judith Hill as national programme lead on 10/04/26 to ask whether training modules on ESR could be accessed by PAs. If this is not an option, further exploration required as to whether training could be purchased from external companies or LAs
Communication	External communication	Development of patient leaflet	Step 1: Making contact and getting Clear Information	Hannah Roan	Amanda Davies	01-Mar-26	31-Mar-26	Completed	Fact sheet developed by national programme and final version shared with HB on 31/04/26
		Development of DP page on SBU's website	Step 1: Making contact and getting Clear Information	Hannah Roan	Melanie Blake	01-Apr-26	30-Apr-26	Not due	
	Internal communication	Development of DP page on Intranet	Step 1: Making contact and getting Clear Information	Hannah Roan	Melanie Blake	01-Apr-26	30-Apr-26	Completed	Fact sheet developed by national programme and final version shared with HB on 31/04/26
		Internal FAQs for staff	Step 1: Making contact and getting Clear Information	Hannah Roan	Amanda Davies	01-Mar-26	31-Mar-26	Completed	Fact sheet developed by national programme and final version shared with HB on 31/04/26
		Service Group leads to ensure FAQ is cascading to teams	Step 1: Making contact and getting Clear Information	Craige Wilson/ Dermot Nolan	Amanda Davies/ Colin Jones	01-Apr-26	30-May-26	Not due	
		Inclusion of notice on DP in Abi's message	Step 1: Making contact and getting Clear Information	Hannah Roan	Melanie Blake	01-Apr-26	30-May-26	Not due	
		Inclusion of notice on DP in Team Brief	Step 1: Making contact and getting Clear Information	Hannah Roan	Melanie Blake	01-Apr-26	30-May-26	Not due	