



Department
for Work &
Pensions

Specialist Advice Proof of Concept

Schedule 2: Services (Specification)

November 2018

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Abbreviations and Glossary of Terms

Action Plan	a document that specifies each element of activity.
Claimant	an eligible individual who uses Jobcentre services for the purposes of preparing for work, returning to work or claiming benefits.
Customer	means the Contracting Authority. In this instance the Department for Work and Pensions (DWP)
Disability Employment Adviser (DEA)	focus on up-skilling and supporting Work Coaches to deliver an excellent service to Claimants who have a health condition or disability which impacts on their ability to find and sustain employment.
Employment and Support Allowance (ESA)	an allowance payable to Claimants who have a disability or health condition.
General Medical Council (GMC)	is a public body that maintains the official register of medical practitioners within the United Kingdom.
Healthcare Professional (HCP)	means the Temporary Workers (i.e. occupational therapists and occupational health professionals) engaged by the Supplier with the relevant skills and experience as stated in the Job Role Specification at Annex 1 to this Specification.
HCP Activity Manager (HCP AM)	is responsible for day to day activity management and ensuring effective delivery of HCP work activities and monitoring of their performance.
Health and Care Professions Council (HCPC)	is an independent, UK-wide regulatory body responsible for setting and maintaining standards of professional from 16 health and care professions in the United Kingdom.
Jobcentre Plus	part of DWP, Jobcentre Plus provides an integrated service to people of working age. It offers help to people looking to move into work and support for people who cannot. Jobcentre Plus also provides services to employers wishing to fill vacancies.
Jobcentre District	a specified area of England, Scotland or Wales within which to deliver Jobcentre Plus services.
Objectives	the factors (i.e. the positive outcomes or benefits) against which the success of a Proof of Concept will be judged in order to justify the investment.
Participant	an eligible individual who uses Jobcentre services for the purposes of preparing for work, returning to work or claiming benefits.

Performance Manager	a Jobcentre Plus employee whose role will be to measure the performance of the contract against expected outcomes.
Proof of Concept (PoC)	a limited trial to test whether a proposal is viable to expand into a full trial or national implementation
Retention Cases	where a person already in employment requires support to retain that employment due to a health condition or disability
Sustainable Operations on the Government Estate (SOG E)	means the targets set against government estate which measure whether it: is sustainably procured, operated and managed; leads in the sustainable procurement of works, supplies and services; is resource efficient; makes efficient use of space and ways of working; conserves and sustainably manages land and encourages biodiversity; and integrates the principles of sustainability fully into working practices.
Universal Credit (UC)	is an allowance which replaces Child Tax Credit, Housing Benefit, Income Support, income-based Jobseeker's Allowance, income-related Employment and Support Allowance and Working Tax Credit – which can be payable to people if they are on a low income or out of work. It is presently being rolled out across the country.
Work Capability Assessments (WCA)	assess whether a Claimant is capable of work rather than focusing on their health condition itself. They look at what work a Claimant can do, as well as what work they can't do.
Work Coach Team Leader (WCTL)	line manages a team of work coaches, coaching, leading and motivating them to deliver excellent service to Claimants

1. Background

- 1.1 The Department for Work and Pensions set out a number of proposals to support Employment and Support Allowance (ESA) and Universal Credit (UC) claimants on a health journey in the Green Paper [‘Improving Lives: Work, Health and Disability’](#) published in October 2016. Where an individual is out of work as a result of a health condition or disability, the employment and health support they receive should be tailored to their personal needs and circumstances. Underlying the Green Paper is the message that appropriate work is good for physical and mental health and self-esteem. Beliefs and confidence about job search and job entry can be enhanced by Work Coach action and have a positive impact on work search activity.
- 1.2 The Green Paper set out a package of support measures called the ‘Personalised Support Package’ which includes the Enhanced Support Offer (ESO). The ESO is a key part of the government’s aim to reduce the disability employment gap. It consists of a number of initiatives to help people with a disability and or health condition move closer to work and where relevant prepare to start work. Participation in the Enhanced Support Offer is voluntary.

As a result the Customer is testing new initiatives to improve the support that it can offer to these claimants and there are a number of ‘Proofs of Concept’ (PoC) running across the country. These smaller scale trials will help the Customer decide what it can do even better to support these specific claimant groups in the future.

2. Scope

- 2.1 The purpose of this PoC is to appoint a Supplier to provide Full Time Equivalent (FTE) Health Care Professionals (HCPs) whose primary role will be to offer Specialist Advice to eligible Claimants, as part of a three-way conversation between themselves, a Jobcentre Work Coach and the Claimant. Annex 1 provides detail regarding the Job Specification for HCPs required to fulfil this PoC.
- 2.2 The PoC will run within two Jobcentre Plus Districts (Surrey and Sussex District and Cumbria and Lancashire District) and will be initially run at a limited number of locations (Clusters) within those two Districts for 10 weeks between March 2019 and May 2019. The first two weeks will include the HCPs’ induction along with time to familiarise themselves with the offices they will be working in. After review by the Customer should the initial 8 weeks of the 10 week trial period generate sufficient volumes of three-way conversations (as determined by the Customer at its sole discretion) then this PoC will then be rolled out to all Clusters within the two Jobcentre Districts for a further 6 months between May and November 2019. The key timescales are detailed in the table below:

Table 1

Specialist Advice Delivery Timescales	
Activity	Period
Contract Award	Late February 2019
Implementation	Early March 2019
Service Commencement (10 week trial period)	11 March 2019
10 week trial period (including induction for HCPs) Note: To include a review of the trial period at the 8 week point (paragraphs 2.2 and 6.4 refers)	11 March through to 17 May 2019
6 month period (including induction for remaining recruited HCPs). Note: The optional 6 month period will be dependant on the results of the 8 week review point.	May through to late November 2019

2.2.1 The Service within each District is comprised as follows:

- Surrey and Sussex – There are six Jobcentre Clusters within the District which are managed by a Customer Service Leader. Two HCPs will be recruited and assigned to two Jobcentre Clusters initially (see Annex 5) with up to a further four HCPs to be assigned to the remaining Clusters within the District subject to approval by the Customer pending review of HCP utilisation (see para 6.4)
- Cumbria and Lancashire – There are eight Jobcentre Clusters within the District which are managed by a Customer Service Leader. Three HCPs will be recruited and assigned to three Jobcentre Clusters initially (see Annex 5) with up to a further five HCPs to be assigned to the remaining Clusters within the District subject to approval by the Customer pending review of HCP utilisation (see para 6.4).

2.2.2 HCPs will be based within one of the two Jobcentre Plus Districts with individual responsibility for specific Jobcentres (see Annex 2) with a requirement to move between those Jobcentres within their assigned Cluster as required.

2.2.3 HCPs will be required to work from 08:30 hrs to 17:00 hrs, Monday to Friday with breaks to be agreed with the HCP Activity Manager.

- 2.3 Due to the three-way conversations being conducted on a voluntary basis there is no guarantee of throughput of eligible Claimants. HCPs will be required in addition to participating in three-way conversations to conduct other supporting activity to promote Claimant take up of the service and build confidence and knowledge of Jobcentre staff working with Claimants. The types of activity that could be expected are detailed in Annex 3 – Supporting Activities.
- 2.4 Activities will be agreed with the relevant Jobcentre District HCP Activity Manager looking to share knowledge and experience with Jobcentre staff and to address specific issues relating to an individual Claimant. This will include but not be limited to:
- Individual Case Conferencing;
 - Group Case Conferencing;
 - Presentations to teams or whole offices on a range of health- related subjects (i.e. health conditions and their impact on work);
 - Collaborate with DEAs, Work Psychologists and Community Partners on projects.

3. Success Factors

- 3.1 The success factors and the determining factor for the continuation of this PoC for the post initial ten week trial period are as follows:
- each HCP carries out on average at least two three-way conversations per day (ten a week) over eight of the ten weeks
 - Over the course of the ten weeks the profile of three-way conversations (in total) delivered will be on an upward or at least flat trajectory from the first week.

The expected overall outcomes of this PoC through the interaction with the HCPs are such that the Specialist Advice three-way conversations:

- increase the Work Coach's confidence to support Claimants with a health condition or disability;
- increase the Work Coach's knowledge and understanding of how the Claimant's health condition interacts with work activity;
- enables Work Coaches to tailor solutions and support to suit the Claimant's needs;
- give the Claimant more confidence in the support the Work Coach is giving them;
- result in the Claimant benefiting from the advice of the HCP on how they can manage their health condition in order to move towards work activity / work;
- encourage Claimants to consider and agree steps towards work and self-efficacy.

- 3.2 The above outcomes will be measured using feedback from HCPs, Work Coaches and WCTLs feeding into a weekly report for the ten week trial period and then monthly if the PoC is widened, from the Jobcentre District HCP Activity Manager and via the PoC evaluation and Management Information see [Section 12](#) and Annex 4 for more details.
- 3.3 The conversation will be Claimant centred and work focused to help Claimants understand the interaction of their health condition or disability on work activity. More information about the format and content of this conversation may be found in Annex 2 – The Three-Way Conversation.
- 3.4 Overall the PoC activities will also:
- establish approximate levels of demand for the Specialist Advice three-way conversations;
 - identify the type of advice sought;
 - measure the success and suitability of three delivery channels for the three-way conversation (face to face, video-conference and telephone);
 - establish whether Claimants are content to participate and actively engage in the conversation and whether it helps build their trust with their Work Coach and the Customer in order to improve their journey towards work
 - establish whether having HCPs within the District improves the confidence and knowledge of Work Coaches, Work Coach Team Leaders, Disability Employer Advisers (DEAs) and the Employer and Partnership Team in working with Claimants with health conditions and disabilities
 - establish whether having a HCP regularly within the Jobcentre enhances the jobcentre offer for Claimants with health conditions and disabilities
 - establish the need for the HCP to provide other supporting activity for the District, and the types of that activity (without replicating support that already exists from the DEAs)

4. Supplier Roles and Responsibilities

- 4.1 The Supplier must ensure that:
- They fulfil 100% of the Customer's requests for HCP provision within two weeks of such request
 - HCPs supplied under this Call Off comply with the standards and possess the relevant qualifications, competencies and skills outlined in Annex 1 to Annex 3 of this Specification. The Customer reserves the right to amend these requirements from time to time, giving reasonable notice to the Supplier of the decision to do so
 - HCPs understand the full range of work they will be required to carry out as stated within Annex 1 to Annex 3 and are aware that they will be required to undertake all aspects of the role
 - They provide required personal information from HCPs to the Customer with sufficient time to ensure that all HCPs are able to access the

Customer's I.T. systems to enable them to deliver the Services pursuant to this Call Off Contract

- HCPs arrive on time (see paragraph 2.2.3 above);
- HCPs are registered with the relevant regulatory body and/or professional body, on the appropriate part(s) of its registers. The Health and Care Professions Council (HCPC) is the only regulatory body for Occupational Therapists and registration is a mandatory requirement;
- HCPs adhere to the DWP Code of Conduct. Guidance about the Code and access to the Code can be found at [Section 10](#) of this Specification;
- the principles of the DWP Customer Charter are embedded in to the service delivered. This may be found at [Section 9](#) of this Specification;
- HCPs do not offer any further advice or sessions to the Claimant outside of the conversation process, or use the Claimant's information for any other purpose other than that set out by the Customer in this Specification;
- HCPs do not offer alternative clinical diagnosis or treatment to that given by the Claimant's own health providers;
- HCPs support the Customer in relation to Subject Access Requests or Freedom of Information requests by providing the requested information within 5 working days of receipt of the request, unless otherwise agreed with the Customer;
- provide a replacement HCP who is compliant with the Job Specification detailed at Annex 1 to this Schedule 2 in the event of sickness or absence within the timescales as stated in Clause 6.7 of Annex A to Part A Framework Schedule 2 (please note this applies to temporary absences);
- Where a HCP gives notice that they intend to finish working on this Call Off Contract, the Supplier must notify the Customer within 1 working day of receiving this notification. The relevant notice period will commence only from the date the Customer receives the notification of intent to finish working (therefore the HCP will need to give to the Supplier a minimum of 1 month plus 1 days' notice or 1 week plus one day's notice as applicable in order for the Supplier to comply with the relevant notice periods). The Supplier must ensure all exiting HCPs complete any open activity and return all Customer property before leaving;
- all Supplier Personnel, including HCPs adhere to the Security Policy defined within the Contract Terms and Conditions;
- all HCPs are made aware that this is a peripatetic role.

4.2 It is desirable for the Supplier to be:

- accredited by the Safe Effective Quality Occupational Health Service Scheme or direct equivalent
- security accredited by the Customer.

5. Health Care Professional (HCP) Role

- 5.1 The HCP job role specification, including qualifications, competencies and skills, may be found at Annex 1.
- 5.2 For the purpose of this Specification the following requirements as detailed within the Service Specification (Annex A to Part A Framework Agreement Schedule 2) shall not apply:
- The requirement for an Ionizing Radiation Certificate (paragraph 5.17.4); and
 - The requirement for Immunisation (paragraph 5.18).

6. Volumes of three-way conversations

- 6.1 The Specialist Advice conversation between the Claimant, Work Coach and HCP is voluntary. For the avoidance of doubt, the Customer does not guarantee any volumes. Work Coaches will be seeking to increase positive Claimant engagement during all their contacts with the Claimant to gain their agreement to participate in the three-way conversation.
- 6.2 Where the HCP is on site and it is convenient for all, they may be asked to conduct an immediate three-way conversation if a Claimant is in the Jobcentre and the Work Coach deems it appropriate.
- 6.3 Claimants eligible for Specialist Advice are:
All Claimants claiming ESA or UC who have a health condition or disability whether or not they have had their Work Capability Assessment (WCA)
- 6.4 Recruitment of HCPs to work within Jobcentre Clusters will initially be limited to five, two for Surrey and Sussex Jobcentre District and three for Cumbria and Lancashire. After 8 weeks of service during initial 10 week trial period the Customer will review HCP utilisation against the Success Factors (para 3 above) to determine whether there is sufficient uptake of three-way conversations to justify further recruitment of HCPs to work at the remaining Jobcentre Clusters within the two Jobcentre Districts. Should the results of the review prove positive then the Customer will approve the further recruitment of HCPs as detailed at paragraph 2.2.1.

7. Liaison with the Jobcentres

- 7.1 As part of the performance and contract management arrangements, the Customer will appoint a HCP Activity Manager within each of the two Jobcentre Districts who will be responsible for day to day activity management and ensuring effective delivery of HCP work activities and monitoring of their performance.

The Activity Manager will:

- liaise with nominated Jobcentre contacts (see paragraph 7.2 below) for diary management of the HCP's daily schedules;
- supervise and support the day to day activities of the HCP;

- set the work activities, review and measure performance;
- receive and review the HCP's weekly note of all the other activities they have undertaken;
- monitor and report on HCP's attendance.

7.2 There will be local nominated contacts within each Jobcentre site, who will be responsible for greeting the HCP on arrival at their appointed Jobcentre location(s) and support them to complete their workload for that day.

8. Induction Training

8.1 In order to ensure the effectiveness and consistency of the Specialist Advice offered by the HCP during the conversation, an Induction Training day will be delivered by the Customer, which will cover as a minimum:

- conditionality and work focussed requirements of all the ESA and UC health journey claimant groups;
- characteristics of all the ESA and UC health journey claimant groups;
- legislative requirements of all the ESA and UC health journey Claimant groups;
- the Customers approach to customer service, equality and diversity;
- awareness of the Jobcentre Plus 6 Point Plan;
- the Unexpected Findings procedure;
- DWP Security and data sharing policy;
- the information pack;
- the other duties that will be undertaken by HCPs.

8.2 This approach ensures the delivery of the Specialist Advice is compliant with the structure of the business as usual work focussed interventions, which it serves to strengthen and supplement.

9. DWP Customer Charter

9.1 The Customer is committed to providing high quality and efficient services to its customers. The [DWP Customer Charter](#) sets out the standards that customers can expect and what their responsibilities are in return. The Customer is dedicated to raising the standards of all its contracted provision and all Suppliers and their sub-contractors must embed the principles of the Customer Charter into the services they deliver on behalf of the Customer.

10. DWP Code of Conduct

10.1 The DWP Code of Conduct spells out the key values and principles of behaviour which the Customer expects of organisations which are essential for creating healthy, high performing supply chains. Suppliers that contract with the Customer must operate in accordance with the Code of Conduct.

10.2 The Code is Annex D to the [DWP Commissioning Strategy](#).

11. Performance

- 11.1 Schedule 6 of the Call Off Order Form provides details of Performance Criteria, Service Level Key Indicators, Specified Performance measures and Service Credits for each Service Period.

12. Evaluation / Management Information

- 12.1 To evaluate the PoC, the Customer will collect and analyse management information. The Customer may also conduct both in-house and externally-commissioned research with colleagues and HCPs including observations of the three-way conversations. HCPs must comply with requests to co-operate with this research.
- 12.2 The PoC evaluation will be conducted throughout the Call Off duration. Management Information (MI) will be used to assess feasibility and demand before deciding whether the Customer will progress to a full trial, which would be subject to separate commercial consideration. Methods used by Customer representatives to gather data will include insight, take-up volumes and conversation observation.
- 12.3 The Supplier must ensure that the MI detailed at Annex 5 is included within their proposed service level and performance management monitoring and reporting process.

13. Sustainable Development

- 13.1 The Customer supports the main goal set out in the UK Strategy for Sustainable Development (Securing the Future, 2005) which is to 'enable all people to satisfy their basic needs and enjoy a better quality of life without compromising the quality of life of future generations. This includes four main aims:
- social progress recognising the needs of everyone
 - effective protection of the environment
 - prudent use of natural resources
 - maintenance of high and stable levels of economic growth
- 13.2 Suppliers must ensure that they and their sub-contractors use all reasonable endeavours to comply with the principles set out in the UK Strategy and the Sustainable Operations on the Government Estate (SOGES) targets. More information can be found on the DWP website.
- <https://www.gov.uk/government/organisations/department-for-work-pensions/about/procurement>
- 13.3 Suppliers must ensure that they remain compliant with current and future changes in the law and DWP Policy by:

- supporting DWP's Public Sector Equality Duty as outlined in the Equality Act 2010

Annex 1 Health Care Professional Job Role Specification

Qualifications and Experience

1. The Supplier must ensure all HCPs have the following qualifications and experience:
 - primarily be an Occupational Therapist or Occupational Health Professional and be registered with the relevant regulatory body and/or professional body, on the appropriate part(s) of its registers. The Health and Care Professions Council (HCPC) is the only regulatory body for Occupational Therapists and registration is a mandatory requirement. Occupational Therapists are also required to be registered with the professional body, the Royal College of Occupational Therapists. have experience of delivering Occupational Health assessments or able to offer Specialist Advice on a wide range of health conditions including but not limited to musculoskeletal and mental health conditions

Competencies and Skills

2. The Supplier must ensure that all HCPs have the following competencies and skills:
 - knowledge of the clinical aspects and likely functional effects of a wide range of medical conditions;
 - be able to offer vocational rehabilitation advice where relevant;
 - be able to address health and disability support needs by providing advice or signposting to specialist support or reasonable adjustments;
 - understanding of the therapeutic value of work;
 - be able to critically evaluate evidence and use logical reasoning to provide accurate evidence-based advice;
 - be able to identify a range of activities which will broaden the claimant's perception of their own capabilities;
 - excellent interpersonal skills;
 - be able to deal with potentially challenging situations e.g. frustrated/upset claimants;
 - be able to collaborate with DWP staff to deliver supporting activity;
 - be able to produce and conduct presentations on a range of health related subjects;
 - be able to mentor/ train
 - be able to actively promote to DWP staff the benefits of the three-way conversation and the help and advice the HCP can provide
3. There will be a requirement for HCPs to have an understanding of the following:
 - understanding of all the ESA and UC health journey claimant groups
 - the impact health conditions and disabilities can have on the ESA and UC health journey claimants in relation to moving closer to/into the labour market;
 - the DWP Code of Conduct;
 - disability awareness;
 - diversity awareness;
 - understanding of the legislative requirements of all the ESA and UC health journey claimant groups;

- an awareness of the Customer's approach to customer service and equal opportunities;
 - understanding of the Jobcentre Plus 6 Point Plan for managing declarations about suicide or self harm.
4. For the avoidance of doubt, the bullet points above in paragraph 3 to Annex 1 will be addressed by the Customer as part of Induction Training, which will be delivered by the Customer to newly recruited HCPs during the Call Off term.
 5. The HCP is required to work flexibly and travel across all the jobcentre sites for which they will be responsible for providing Specialist Advice and additional support.

Annex 2 Three-way Conversation

1. The Claimant participation in the Specialist Advice three-way conversation is entirely voluntary.
2. The HCP will follow the lead of the Work Coach to deliver a Claimant-centred, work-activity focused conversation which takes account of interaction between work activity and the Claimant's health condition(s). This advice will cover exploring appropriate work related activity, further employment focused support that could be required, work activity adjustments and general health and lifestyle management advice.
3. In most cases, the HCP will prepare before the interview by reading notes and information provided by the Work Coach and discussing with them the approach they will take in the conversation.
4. Usually, the Work Coach will have pre-booked the interview after discussing Specialist Advice with a customer beforehand. However, there will be instances where this is not possible. For example, if a claimant has asked to speak with a HCP whilst attending a jobcentre for another reason; their circumstances might restrict their availability and the HCP may need to conduct the three-way conversation or give specialist advice without the usual time to prepare. In these cases, the HCP and Work Coach will agree if an ad-hoc meeting is appropriate.
5. There will be instances when more preparation time is needed to deliver a three-way conversation, for example with complex cases where an ad-hoc interview might not be appropriate.
6. The HCP will support the Work Coach during the interview to identify the steps the Claimant should take to move towards work.
7. In most cases, the Customer (the local nominated Jobcentre contact) will provide an information pack to the HCP prior to each scheduled conversation, which will include:
 - a referral form including a summary of the WCA outcome and any relevant background information;
 - unexpected Findings template;
 - Claimant consent form (to notify their GP of any Unexpected Findings).
8. In most cases, the HCP must review and discuss the information pack with the Work Coach before the conversation takes place, in order to familiarise themselves with the Claimant's medical condition(s) and individual circumstances. The Work Coach and HCP must also agree how the meeting will be structured, however the Work Coach will lead the conversation with the Claimant.

9. The conversation will then take place in a private area within the Jobcentre, either face to face meeting or by video conference or telephone, which will be determined by the Customer. Any IT equipment required to conduct the conversation will be supplied and facilitated by the Customer.
10. During the conversation, the HCP must:
- help the Work Coach to assess the Claimant's work related activity needs, building the Work Coach's capability in tailoring work related solutions and support for Claimants with a health condition(s)
 - engage with the Claimant, building rapport and encouraging them to have an open and realistic conversation about what will facilitate them with work related activity and identifying their employment strengths and assets
 - assess the interaction between work activity and the Claimant's health condition(s) on the Claimant's ability to move towards work
 - help the Claimant identify the limitations of their health condition(s) and how to manage them (particularly in relation to fluctuating conditions) but at the same time, focus on the Claimant's capabilities – what they *can* do, identifying strengths and ways of motivating the Claimant, to encourage them to consider and agree steps towards work and self-efficacy
 - identify any additional support and practical measures to help the Claimant manage their health condition(s)
 - provide practical and tailored advice about adjustments and support that will enable the claimant to move closer to the labour market
 - support the development of an individually-tailored action plan, detailing agreed activities between the Work Coach and the claimant
 - ensure a consistent, professional, joint approach with the Work Coach at the three-way interviews with the Claimant
 - **not** offer alternative clinical diagnosis or treatment to that given by the Claimant's own health providers, or provide advice to contradict or where relevant challenge the Customer's WCA decision
 - take detailed notes of advice provided to the Work Coach and Claimant, which as a minimum must include:
 - the nature of the Claimant's health condition(s)
 - the impact of the health condition(s) on the Claimant, associated limitations and how to overcome or manage them
 - how the individual will function in work related activity
 - actions agreed for inclusion within the Claimant's Action Plan
11. Following the conversation, the HCP must;
- complete the Notes Template, sign and date accordingly
 - return the information pack and the Notes Template to the Customer's representative (the local nominated jobcentre contact) before leaving the jobcentre premises

Annex 3 Supporting Activity

1. The HCP will only undertake supporting activity in the absence of any pre-booked or ad-hoc Specialist Advice interview, during the course of jobcentre business.
2. This supporting activity could include:
 - Individual Case Conferencing;
 - Group Case Conferencing;
 - Presentations to teams or whole offices on health-related subjects;
 - Collaborating with DEAs and Work Psychologists on projects;
 - Working with Employer Engagement teams on Retention cases;
 - Other work that will support the district.
3. **Case Conferences (individual and group):**
 - 3.1 The HCP will engage with individual Work Coaches to discuss Claimants that may or may not have already been seen by the HCP. The HCP will discuss the interaction of their health condition or disability on work activity and discuss services that may support the Claimant. The HCP may also help the Work Coach understand the impact of the health condition so the Work Coach can improve their engagement with the Claimant.
 - 3.2 Individual case conferences can occur either booked in advance (by the Work Coach or Work Coach Team Leader contacting the HCP Activity Manager to arrange); or may occur ad-hoc if the HCP is available to speak to the Work Coach in the first instance.
 - 3.3 Group case conferences will be conducted during times the WCTL has set aside for them. They will include a number of WCs, and may also include the WCTL and a DEA. Typically, a group case conference will discuss 2-3 cases and the HCP will provide advice on barriers to work and solutions, providing explanations behind certain conditions and how they affect finding and keeping work.
 - 3.4 There may be other instances where case conferences are undertaken with a WCTL, DEA, or work psychologist present.
4. **Team and office presentations:**
 - 4.1 The HCP is expected to deliver occasional presentations either in a team setting, or whole office setting.
 - 4.2 Presentations may cover the following:
 - Specific health conditions and their impact on work;
 - Local health and disability services and what they offer;

- Projects developed in collaboration with district enabling roles.

(This list is not exhaustive but will only cover health-related content)

- 4.3 On occasion, the HCP may be called upon to contribute to group information sessions on the benefits of the three way conversation to claimants.
- 4.4 **Retention cases:**
 - 4.1 The HCP will work with Employment Advisers and DEAs on specific retention cases.
 - 4.2 This activity will include case conferencing with Jobcentre staff, and discussions with the Claimant under the Specialist Advice interview.
 - 4.3 HCPs will support Employment Engagement teams by providing advice and experience through individual case conferences and team presentations
 - 4.4 The HCP will **not** represent Claimants during meetings with their employers, or represent them during tribunals, or complete retention paperwork. The HCP will act in a consultative capacity only.
5. **Other work:**
 - 5.1 It may be necessary for the HCP to collaborate with other enabling roles and district functions in areas of disability and health.
 - 5.2 This activity may include:
 - working on presentations either for Jobcentre staff or group sessions;
 - working on health and disability products for Jobcentre staff or Claimants;
 - contributing the design of local provision that supports people with health conditions or disabilities;
 - supporting Partnership Managers at external events, meetings.
6. The HCP will only engage in the above activity if no Specialist Advice interviews have been pre-booked. The HCP must still be resident in their assigned office, as agreed to by the HCP and/or the Activity Manager.
7. All supporting activity will be documented by the HCP in a weekly note.

Annex 4 Management Information

Contractor Information Required	Frequency or Date Required by
Monthly summary of activity:	
Supplier response time in the provision of HCPs (in accordance with Schedule 6 and paragraph 4.1 to this Schedule 2).	Calendar monthly
Attendance records of HCPs (in accordance with Schedule 6 and paragraph 2.2.3 and paragraph 4 to this Schedule 2).	During 10 week trial on a weekly basis, if widening of PoC approved the on a monthly basis
Ad-hoc requests	Within 5 working days of receipt of request from the Authority

Annex 5 Geographical coverage for HCPs

Jobcentre clusters for the initial 10 week period of the PoC with one HCP per cluster:

Surrey and Sussex District (2 x HCPs)

Jobcentre cluster	Jobcentres
Hastings and Bexhill	Hastings
	Bexhill
Gatwick Diamond	Crawley
	Horsham
	Redhill
	Epsom

Cumbria and Lancashire District (3 x HCPs)

Jobcentre cluster	Jobcentres
SA 2	Carlisle
	Penrith
	Kendal
SA 5	Chorley
	Ormskirk
	Skelmersdale
SA 8	Accrington
	Blackburn
	Clitheroe

Additional Jobcentre clusters Post initial 10 week period of the PoC with one HCP per cluster:

Surrey and Sussex District (Additional 4 x HCPs (7 x HCPs in total for the 6 month PoC))

Jobcentre cluster	Jobcentres
East Sussex	Eastbourne
	Newhaven
	Lewes
	Haywards Heath
Brighton and Hove	Brighton
	Hove
West Sussex	Worthing
	Chichester
	Littlehampton
	Bognor
Surrey	Guildford
	Woking
	Camberley
	Weybridge,
	Staines

Cumbria and Lancashire District (Additional 5 x HCPs (7 x HCPs in total for the 6 month PoC))

Jobcentre cluster	Jobcentres
SA 1	Whitehaven
	Barrow
	Workington
SA 3	Lancaster
	Morecambe
	Fleetwood
SA 4	Leyland
	Preston
SA 6	Blackpool
	St Annes,
SA 7	Burnley
	Nelson
	Rawtenstall