

SCDIP Discovery Phase – Kirklees Council

This project explored providing service users and carers with access to online care accounts, enabling them to complete tasks such as updating adult social care information or downloading care plans.

Access to care accounts

The context

In Kirklees there are 15,800 users of adult social care services and 4,000 registered carers. Many carers have complex life situations, which can make accessing services during office opening hours challenging. At present service users and carers have no direct access to real-time information held about their care or services received. The Care Act indicates that local authorities must allow citizens access to records and care accounts.

The challenge

The project team focussed on addressing the problem question: *“How might we enable service users and carers to access information about their care services to give them more control?”* The project investigated the options available for the provision of an online care account and challenged the technology market to provide a user focused solution.

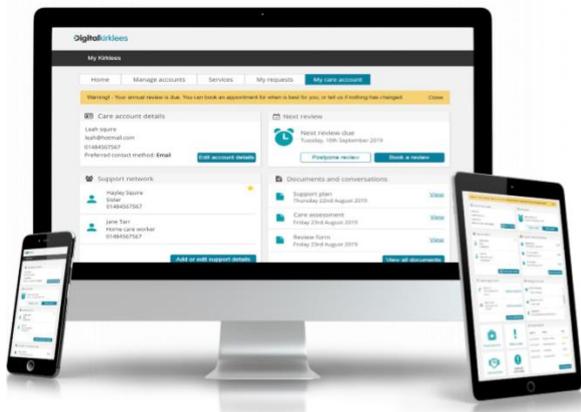
What did the project involve?

The discovery phase involved:

1. User engagement in the form of:
 - 16 one to one interviews with service users and carers
 - two workshops including persona creation and user journey mapping
 - user experience and user need validation surveys with 55 responses
 - solution prototyping and user testing.
2. Data gathering and analysis, considering sources such as:
 - user needs prioritisation and backlog creation
 - Horizon scanning, and third-party systems review
 - Google analytics
 - online contact form data analysis
 - adult social care case management data (CareFirst)
 - telephony call coding data.

Stakeholder engagement and user research

Kirklees Council partnered with Lagom Strategy to gather views from services users, carers and paid advocates. As part of the engagement and research, workshops were conducted with adult social care service users and carers to understand their situations and their current experience of accessing services, including the frustrations and barriers they face. User feedback surveys and telephone interviews were conducted to gather wider feedback and build an evidence base including volumes of need. The prototype developed (as shown below) was tested by a range of stakeholders, including service users, carers, telephony staff and social workers to gather views and feedback.



Benefits of the proposed solution

For discovery phase:

- improved awareness of high-level user needs
- improved understanding of the digital literacy of clients and carers to provide the most appropriate services
- key stakeholder engagement and buy in from staff and service users.

In the implementation phase, the council plan to further develop the prototype and the likely benefits include:

- reducing the need for staff to complete minor repetitive tasks which add limited value for clients, such as updating contact details
- freeing up staff to deal with more complex and urgent requests and providing more time to those unable to use a digital solution
- allowing clients/carers time and space to read and understand information
- providing clients/carers easy access to information and the ability to update or download care data as and when required at no cost
- enabling more assessments to be carried out remotely at first point of contact
- increasing efficiency in processing to allow a refocus of workload, with more emphasis on complex cases and prevention
- greater consistency of approach, improving the outcomes for individuals.

Key strengths of the project

- **prioritisation:** user needs were prioritised alongside activity volume data to select the most pertinent tasks to include in the prototype
- **stakeholder engagement:** the prototyped solution was tested by a wide range of stakeholders, including service users, carers, telephony staff and social workers to gather views and feedback
- **scoping of options:** the project team reviewed current care account products to scope out feasibility and compatibility with current systems.



The potential impact

The team have achieved what they were hoping for from the discovery phase and have developed a logic model to guide the implementation phase and to help in quantifying the inputs, activities, outputs, outcomes and impacts which are likely to result from the delivery of this project. From this, a number of key outcomes and measures of impact have been identified as follows:

- service users can take ownership of appointment booking, amendment and cancellation
- users can access assessment and review documents including support plans
- users are able to update personal information and say who can speak on their behalf
- reduced calls to the council for routine tasks and updates
- staff members have more time to allocate to complex requests, reducing waiting times
- improved quality of care record information helping social care teams to provide the right services at the right time.

The team have established the following success measures for their solution:

- improved transparency and control for service users
- improved satisfaction and reduced stress for service users
- reduced dependence on council services
- increased independence and control for service users and carers
- improved access to support for service users and carers
- more timely updates to support to match care needs
- contact made more quickly and efficiently causing less stress to service users and carers.

Challenges to delivery and lessons learned

- A challenge has been identified around how to host the care record and the functionality it can support i.e. to book appointments would require a restructure of the diary processes, as part of the wider transformation project in adult social care. This will be explored further as part of the implementation phase.
- Working with a research partner required a significant amount of internal resource to ensure that it is kept on track and key outcomes are delivered.
- Individuals want to be kept informed of the potential changes to services if they have been involved in consultations. In order to achieve this, the team plan to contact everyone involved in the survey and the engagement workshops and to publish their discovery phase report as well as an easy-read version for people with learning difficulties. They are also putting their videos online.

Considerations for the future:

- The team suggested that it may have been beneficial to mobilise more quickly due to the tight timescales.
- There were some challenges in using remote research methods such as surveys due to the need to tailor these for non-typical audiences. This may be something they consider in future research.

Next steps, including sustainability and spread

The team would like to take forward the prototyped account and develop it into an integrated working product to deliver a solution to meet the needs of all stakeholders and present 'self-service' access and management of the information held about service users, 24 hours a day – 7 days a week. The account would meet the needs of service users and carers who would prefer flexibility and increased control over their information. It would also allow face to face and telephone contact to be available for more urgent needs and for those who are unable to, or prefer not to, do things online. The team will also be able to collect evidence against the success measures developed.

Contact details

- Stephanie Fossey: stephanie.fossey@kirklees.gov.uk
- Hayley Mozley: hayley.mozley@kirklees.gov.uk

Link to relevant documents

Kirklees Council Discovery Phase findings, including video and easy read report:
www.kirklees.gov.uk/digitalinnovation

Kirklees Council's Discovery Phase review report:
www.local.gov.uk/sites/default/files/documents/Kirklees%20Discovery%20Phase%20Review.pdf