SCDIP Discovery Phase – Norfolk County Council

The project aims to reduce overheads by introducing a digital system for booking appointments for social care practitioners.

Time to Connect

The context

Currently social care practitioners arrange their own appointments with service users. This means that practitioners spend a lot of time on appointment booking and associated administration rather than focusing on operational work, which has an impact on holding lists (i.e. a list of individuals referred to the team for assessment that are waiting for an appointment). There are different ways of working amongst practitioners (some use Outlook and others use paper diaries) which makes managing appointments in cases of absence or sickness difficult.

The challenge

The team aims to improve the efficiency of social care and the service user's experience by reducing the overheads in the current appointments process and by introducing a digital solution to support the process. The team focussed their research using the following problem statement: "*How can practitioners use their time more efficiently and effectively to help prevent, reduce and delay?".* This project sought to determine how a technological solution could be used to release practitioner time, whilst creating a more efficient and effective appointment booking system. A new role of Living Well Officer was recently created and will take on the responsibility of appointment booking with the digital solution in place to assist them and the team in managing appointments.
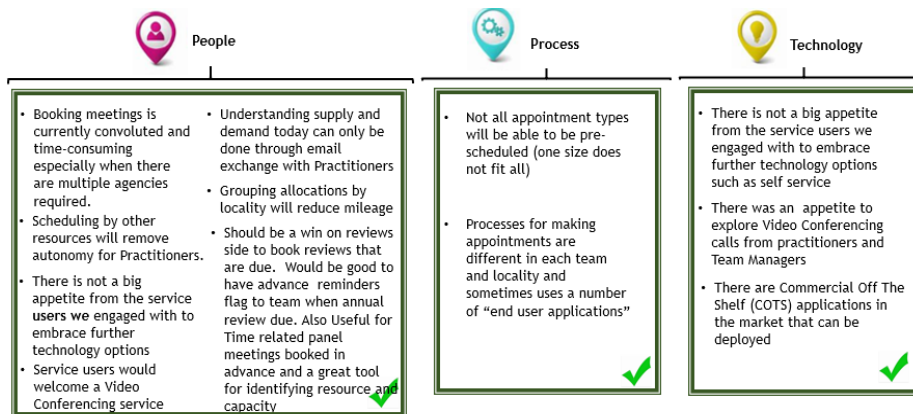
What did the project involve?

The project team began by developing a service map to understand what information they needed to capture from whom and how they would go about it. They then agreed on a set of personas and user journey questions. This was followed by stakeholder engagement with Heads of Service, team managers, practice consultants and practitioners. The project team developed a high-level requirement specification for procurement of the digital solution and completed a preliminary procurement process to understand whether there is any existing technology which could achieve their solution – this found a number of potential commercial off-the-shelf solutions that could be suitable.

Stakeholder engagement and user research

The team were able to engage a validated sample of stakeholders during their research. The team used a variety of research methods and engagement events including:

- feedback questionnaires to practitioners and team managers
- seven stakeholder meetings with Heads of Service
- over twenty workshops with team managers
- two user group meetings to review project outputs and request feedback with 40 attendees
- two steering group meetings with 30 attendees
- twelve coffee morning interviews with residents at a Norfolk First Response Unit
- a meeting with Making it Real Norfolk to introduce the project
- ten early supplier engagement meetings
- display stand at Staff Conference "Conversations Matter" to raise awareness and capture feedback.

The team made the following key findings:

People

- Booking meetings is currently convoluted and time-consuming especially when there are multiple agencies required.
- Scheduling by other resources will remove autonomy for Practitioners.
- There is not a big appetite from the service **users we** engaged with to embrace further technology options
- Service users would welcome a Video Conferencing service

- Understanding supply and demand today can only be done through email exchange with Practitioners
- Grouping allocations by locality will reduce mileage
- Should be a win on reviews side to book reviews that are due. Would be good to have advance reminders flag to team when annual review due. Also Useful for Time related panel meetings booked in advance and a great tool for identifying resource and capacity ✔

Process

- Not all appointment types will be able to be pre-scheduled (one size does not fit all)
- Processes for making appointments are different in each team and locality and sometimes uses a number of "end user applications" ✔

Technology

- There is not a big appetite from the service users we engaged with to embrace further technology options
- There was an appetite to explore Video Conferencing calls from practitioners and Team Managers
- There are Commercial Off The Shelf (COTS) applications in the market that can be deployed ✔

Benefits of the proposed solution

The team have created a data dashboard that can be used during the project's implementation phase to ascertain how they are tracking against key outcomes.

In the implementation phase, the council proposes to achieve the following benefits:

1. **For the service users:**
   - increased face-to-face time with Practitioners
   - promotion of independence and wellbeing
   - shorter waiting times

2. **For the practitioner:**
   - quicker processing of appointments
   - enhanced mobile working

3. **For team managers/practice consultants/the organisation:**
   - reduction in costs (i.e. travel time, mileage)
   - ability to quickly and effectively reassign appointments if required
   - a greater understanding of practitioner capacity and demand
   - reduction in complaints
   - ability to manage reviews proactively

Key strengths of the project

1. **More time for face-to-face service user activity:** Living Well Officers booking appointments on behalf of the practitioner will enable us to utilise our resources more efficiently which will reduce waiting time for appointments and allow for more face to face service user activity.

2. **Promoting independence:** It is intended that the service user journey is improved as current unallocated and overdue work is cleared and future appointments are scheduled. Therefore, service users should be provided with an appointment at an earlier stage and not be placed on a holding/waiting list and, appointment details are formally communicated. This will improve the quality of the customer experience.

3. **Mobile tools and technology:** Enable the adoption of the existing Mobile Working project and supports smarter ways of working and cultural change.

4. **Strong stakeholder engagement:** Engagement was even stronger than anticipated and enabled the team to explore the issues in greater detail.

The potential impact

The team believe that their discovery phase was successful in achieving their aims. They set out to understand whether there was a solution that could provide what they needed to free up practitioner time and they have validated that a solution exists. During the discovery phase, the council 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:

1. **More time face-to-face:** measured by an increase in conversation 1(Listening, engaging and connecting to meet needs and outcomes) and conversation 2 (Averting, resolving and stabilising a crisis), reassessments and annual reviews.

2. **Promoting independence, enhancing service user experience and reduction in management of holding list:** Service users should be provided with an appointment at an earlier stage. This will be measured by the reduction in holding lists and that 70% of service users will be reviewed within timescales by August 2021.

3. **Reduction in cost:** the council anticipate savings of more than £40 million (from a range of projects) over the next three years. They have a targeted reduction in travel expenses of 15-20% on the £330,000 currently spent, to which this project will contribute.

Challenges to delivery and lessons learned

The team have been conscious of the culture change required to support implementation. They have had to balance efficiency with professional autonomy and are aware that not every practitioner will be content with their work calendar being organised for them. To mitigate this, the team have ensured they had the appropriate support from management and were proactive in managing any concerns. They applied learning from a previous project to facilitate this.

Were the team to conduct the discovery phase again, they would allow more time as they had a number of projects happening simultaneously which created challenges internally.

Next steps, including sustainability and spread

The team believe that expanding the project within Norfolk is possible once they have a contract with a provider. To support this, it will be necessary to scale up the licences and hardware.

However, there are a few outstanding considerations:

- they are deciding whether to include only adult social care appointments in the systems or whether they should also extend the solution to Children's Services as some practitioners work across both and having two sets of administrative systems and processes could be confusing
- depending on the costs involved, if they wanted to scale up the project on a larger scale they would have to go through the Official Journal of the European Union (OJEU) procurement processes again, meaning they may need to consider a range of alternative providers.

Contact

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Link to relevant documents

Norfolk County Council Discover Phase review report:

https://www.local.gov.uk/sites/default/files/documents/Norfolk%20Discovery%20Phase%20Review.pdf