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Programme Name	Digital Innovation Programme, <i>Right Care, Right Time, Right Place</i>	Date	16/08/2024
Projects Names	Social Work Practitioner Application Home Care Commissioning Portal		
Programme Lead	Fraser Bell	Version	1.0
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A. ORGANISATIONAL CONTEXT

<p>Alignment to Strategy:</p>	<p>The Integration Joint Board’s (IJB) Strategic Plan identifies four Strategic Aims:</p> <ol style="list-style-type: none"> 1. Caring Together; 2. Keeping People Safe at Home; 3. Preventing Ill Health; and 4. Achieving Fulfilling, Healthy Lives. <p>To help deliver the Strategic Aims, the plan recognises Technology as an Enabling Priority. To support the delivery of this Enabling Priority, the IJB at its meeting on 26 March 2024 set aside £1.5m for potential investment into digital innovation.</p> <p>The two proposals below seek to invest £1.25m, and notes estimated annual recurring cost of approximately £250,000. These proposals would develop the IJB’s digital capability in a manner that would contribute to the delivery of the IJB’s Strategic Aims and create the capacity necessary to help address the savings required over the next seven years as set out in the IJB’s Medium Term Financial Framework (MTFF).</p>
<p>Specialties/Services/ Partners in scope:</p>	<p>The two proposed projects set out below would be added to the IJB’s Strategic Delivery Plan. Progress against the Delivery Plan is monitored through the IJB Risk, Audit and Performance Committee on a quarterly basis and through the IJB on an annual basis.</p> <p>The proposals have been developed in close cooperation with the Aberdeen City Council Chief Digital Officer and following consultation with the NHS Grampian Chief Digital Officer. This work aligns with the principles identified in Aberdeen City Council’s (ACC’s) Target Operating Model 1.2. This includes the rationalisation of digital systems and the promotion of more integrated systems. The proposals, if approved, will be developed and implemented with Aberdeen City Council (ACC) and in consultation with NHS Grampian (NHSG).</p>

1. Recommendation



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It is recommended that the IJB :

- i. Agrees to the development and provision of Digital Innovation Services to the value of £1.25m and notes the estimated annual recurring cost of approximately £250,000 and;
- ii. Makes the direction at appendix 3 to Aberdeen City Council and instructs the Chief Officer to issue the Direction to Aberdeen City Council.

2. Background

The impact of an ageing population with a corresponding increase in long term health conditions and complex care needs puts increasing financial and resource pressures on services. In addition to the increased demand on services, there are significant financial constraints. In order to meet increasing demand, services require to adapt and modernise how they deliver services and transform the way care is delivered. The '[Feeley Report](#)' underscores the importance of a person-centred approach, advocating for increased investment in social care and the integration of technology to enhance care delivery. By incorporating advanced digital tools, this not only improves care efficiency and quality but also ensures that care services are both flexible and comprehensive, aligning with the person-centred ethos championed by the report. The need for the use of technology to be fully integrated into the delivery of health and social care services is of crucial importance in the current landscape.

In addition, Scotland's Digital Health and Care Strategy calls for the adoption of digital technologies to improve health outcomes, accessibility, and patient experience. Investing in the workforce to be more digitally informed with the right digital tools will enable greater capacity and flexibility as well as a more engaged, motivated and supported workforce.

The partnership has been in active dialogue with Microsoft since 2023, building on Microsoft's partnership with ACC and their successful contribution to ACC's transformation programme including the creation of Dynamics 365, the social work digital platform. Microsoft has been engaging with the partnership's senior leadership team both collectively and individually to understand in greater detail the Strategic Aims of the IJB and the challenges to delivering those Aims.

Following Microsoft's audit of IJB activity and having due regard the complexity of delivery of various options and their respective impacts, Microsoft has divided investment opportunities into two phases, namely Phase A and Phase B as set out in Section 3 below. This business case seeks approval to invest in two projects set under Phase A. These proposals are for the Adult Social Care and are:

- Social Work Practitioner Application; and
- Home Care Commissioning Portal.

These proposals have been developed following extensive dialogue and engagement with members of the Adult Social Care team and seek to build on and link to existing capability that has been developed in recent years, including Dynamics 365.



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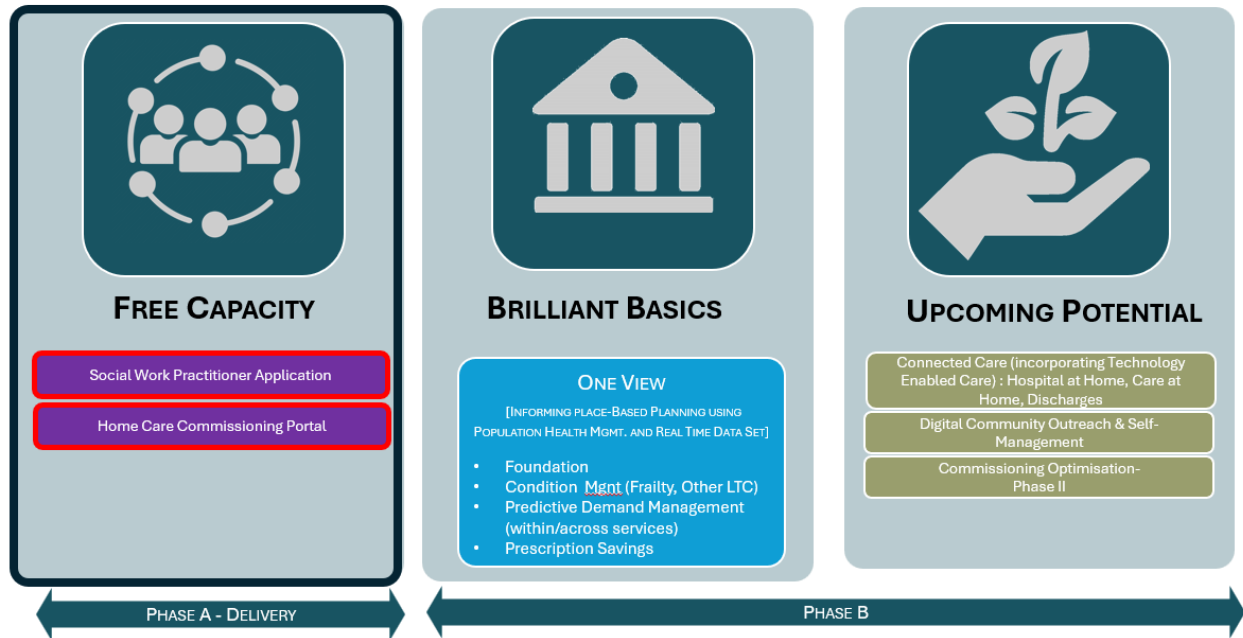
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Phase B proposals would incorporate a higher degree of complexity to deliver. ACHSCP will continue to develop these opportunities in consultation with ACC and NHSG with business cases being presented to the IJB in the future as and when required and appropriate. This includes the development of a business case to invest in Technology Enabled Care.

3. Phased Delivery



PHASED DELIVERY HAS BEEN AGREED WITH ACHSCP WITH PRIORITY FOR DELIVERY ON FREE CAPACITY INITIATIVES



4. Benefits Expected

Home Care Commissioning Portal*

There is an opportunity to bring agility, transparency, and value for money to the provision of Home Care Services. Currently, social work has two members of staff who coordinate the packages of care required. A significant amount of time and manual spreadsheets are used to work with providers on getting care in place. In addition, Granite Care Consortium currently has several support staff who do a manual trawl to match packages to their availability. Bon Accord Care (BAC) also has a member of staff who oversees their care offers.

This has been identified as a priority by ACHSCP staff to address, amongst other things:

- failure demand;
- decrease the time to issue a care offer to mitigate levels of unmet need;
- create additional staff capacity; and
- ultimately increase value for money on the contracted services, particularly in a context of budget contractions.

To help address these the matters raised above, the Home Care Commissioning portal would, amongst other things, be able to:

- Provide a single platform, integrated to D365, with a single view of request for Home Care;



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- Create additional staff capacity, estimated to be the equivalent of 2 full time equivalent (fte) within ACHSCP and 4fte within providers (combined full year equivalent: approx. £300k);
- Enable a single view of request, including status to all members of the value chain;
- Enable notifications when status change;
- Provide an integrated dashboard and reporting of requests per geographical area, type of request, demographics, client group, etc.;
- Enable a geographical view of where/which type of demand is being generated;
- Enable the consortium of providers to issue requests to their member providers;
- Enable suppliers to receive and respond to requests as close to real time as possible;
- Enable every user in the value chain (as required) to understand status of request (with permissions limited to their scope of work);
- Enable every user in the value chain to report a change of circumstance (including the family or social worker);
- Enable an interface to capture feedback to be shared and integrated to D365, e.g., feedback from family on service quality, feedback from carer on observations during the visit for further consideration of the social worker; and
- Keep a secure and centralised exchange of Home Care Plans.

Following full implementation of the Portal, and through the leveraging of information held in D365, future demand will be able to be predicted across each:

- geographic catchment area;
- customer group; and
- demographic.

This will help inform decisions on how best to meet emerging need in the short, medium and long term.

Social Work Practitioner Application

Social Work is under increasing scrutiny with the need to demonstrate its responsiveness to complex needs across different client groups, the appropriateness and efficacy of its interventions, and the impact on client experiences and outcomes.

The vision for adult social work in Aberdeen is based on a prevention and early intervention model, working in collaboration across sectors and services to prevent, intervene and deliver services to those who require it. Historically, social work practitioners were able to fulfil their statutory requirements and at the same time undertake pro-active, person-centred interventions that addressed a wide range of presenting needs, some more acute



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than others. In recent years, social workers have become more office based, administrative focused and task-oriented with interventions delivered within the scope of eligibility criteria and budget availability. This has resulted in a shift of focus to those higher-end and more complex referrals within limited resources. The increased demand for services has resulted in high caseloads, significant waiting lists and delays in service provision and overstretched teams.

Microsoft has proposed a Social Work Practitioner Application to automate the capture of data and the subsequent preparation of draft documentation and reports for review of the Adult Social Worker. By doing so, Adult Social Workers would, amongst other things:

- increase attention during the interaction to enhance the staff and service user experience;
- spend less time on manual documentation; and
- have greater capacity to invest greater time in other higher value activities such as early intervention and prevention.

This would also increase the speed at which the cycle of assessments is completed, allowing for a timely handover where required. This is in contrast to the current context where social workers will instead take written notes during interactions (very frequently one after the other), and after have to allocate a significant amount of time to transcribe and format outcomes as per established online forms.

At high level, the proposed solution would be able to:

- transcribe a live session with a citizen and be able to recognise the participants based on their voice;
- automatically summarise the discussion through identification of questions, answers, and key observations;
- structure a draft report for review, as per preferred format, that can then be reviewed by the social worker; and
- upload the report to the platform of reporting in the way of assessment form (as per set up in D365) under the record of the client.

The current model anticipates that it could create capacity to the equivalent of 16fte (£50k per 1fte x 16 = approx. £800,000 full year equivalent). This is based on the following assumptions that have been agreed with the Adult Social Work team:

- There are approximately 600 social work staff who work for ACHSCP.
- Approximately 75% of social workers, i.e., 450 social workers, would routinely use the application ('App').
- It is anticipated that those 450 social workers will each attend at least 4 interactions per week on average with people where a detailed case note will be required to be recorded.
- That is approximately 1,800 interactions per week where the App could be used.
- It is assumed that 70% of clients in those 1,800 interactions would approve the use of the App to transcribe the meeting, i.e., 1,260 clients.
- On average, it can take 2 hours per social worker per interaction to record a detailed assessment report of a 1-hour interaction; and



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- Through use of the App, the time to record a detailed report of the interaction is envisaged to reduce by 25%.

5. Risks and Issues

Risk	Likelihood/Impact	Mitigation
Mobile Phone use with the Social Work Practitioner App will increase data usage and may incur unforeseen costs	High	Ongoing investigation with ACC Chief Digital Officer to assess impact and take mitigating actions.
Policy Change New ways of working may require policy or standard changes this would affect timeline and delivery	Medium	Ongoing investigation with Cyber Security Officer & Data Protection Officers to assess impact. Any Policy Change required will go through the respective organisational procedures.
Delivery Timescales – Vendor has indicated a window for product delivery. Any delay may incur additional cost and/or delay benefits realisation.	High	Ongoing investigation between ACHSCP, ACC Chief Digital Officer, Microsoft to ensure approach and timescales are deliverable within resource identified. A staggered approach to the delivery of the two projects is being developed to help manage the demand on staff during the delivery phase.
Resources – There is a risk that ACHSCP or ACC working together fail to identify and maintain	High	Ongoing discussions and investigation into the resources required to



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adequate staff resource required to deliver the projects.		deliver the project between key stakeholders.
Budget – Failure to deliver proposals within available budget.	Medium	The projects will be subject to a robust governance structure to help ensure that the project is delivered within the agreed budget and timeline so far as possible.
Adoption – Failure to adopt new digital capability by staff, service providers or lack of permission from citizens to use capability.	Medium	Ongoing work as part of the project to provide engagement and support to staff/service providers and also public to assist with adoption of new applications and aligned benefits.
Benefits – Failure to deliver projected financial and non-financial benefits.	Medium	<p>There has been extensive work to identify the financial and non-financial benefits. It is noted that in particular with the initial resource required for these projects, that financial savings will be in the medium to longer term. An element of the return on investment is dependent on staff turnover.</p> <p>As part of the budget setting process, due regard will be taken to the financial benefits that each proposed project has anticipated to ensure that the benefits identified are realised.</p> <p>Whilst investment in leading edge technology carries inherent risk, careful diligence has been</p>



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undertaken to ensure that the tools available to the provider are fit for the task and that their teams have the skills to build the proposed solution.

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6. Estimate of Resources Required

The programme of work to deliver the two projects, if approved, is anticipated to run October 2024 – May 2025. The following resources having been identified as being required to deliver the projects set out within the business case. Work is ongoing with partners to identify the capacity and capability against each Resource Title.

Programme Roles Required

Resource Title	Organisation	Time Commitment	Main Tasks
Project Manager	Strategy & Transformation, ACHSCP	Full Time	<ul style="list-style-type: none"> Oversees and coordinates the overall engagement and delivers it on schedule. Oversees the Customer resource allocation, risk management, engagement priorities, and communication with executive management. Coordinates decisions within three business days, or according to an otherwise agreed-upon timeline. Communicates the engagement efforts and activities to the Executive Steering Committee and stakeholders.
Technical lead	Digital, ACC	Part Time	<ul style="list-style-type: none"> Serves as the primary technical point of contact for the Adult Social Work Team and Microsoft.
Business Analyst	Digital, ACC	Full- Time	<ul style="list-style-type: none"> Working with product owners, subject matter experts, user representatives

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- Main point of contact to consolidate user stories, in advance of sprint, to ensure definition of ready is finalised
- Ad-hoc validation sessions (once a sprint)
- Sprint planning/review every sprint.
- 2 days of testing every sprint
- 1 week of testing during User Acceptance Team (UAT)

Product Delivery Roles Required for each Product: Home Care Commissioning Portal and Social Care Practitioner Application

Resource Title	Organisation	Time Commitment	Main Tasks
Product Owner(s)	Adult Social Work, ACHSCP	Full Time	<ul style="list-style-type: none"> • One required per product team for each project. • Prioritises and approves backlog (user stories to be implemented) • Answers key requirements questions with the help of subject matter experts • Coordinates/facilitates access to other teams. • Initial backlog definition during Sprint 0 (4 workshops) • Standup every day • Sprint planning/review, shaping every sprint.
Digital and Technology Team Member(s)	Digital, ACC	Part Time	<ul style="list-style-type: none"> • Support with connectivity into test and production environment of other systems to be integrated. • Set up users and licenses needed for onboarding testers and later production users. • Non-functional requirement definition, deployment support



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Subject Matter Expert(s)	Adult Social Work, ACHSCP	Part Time	<ul style="list-style-type: none"> • Required per product team. • Support in detailed requirement definition. • Provide test and production content/data. • Help defining the test scenarios to cover. • Participate in testing the increment results every 3 weeks. • Initial backlog definition during Sprint 0 (4 workshops) • Standup every day • Sprint planning/review every sprint. • 2 days of testing every sprint • 1 week of testing during UAT
User Representative(s)	Adult Social Work, ACHSCP	Part Time	<ul style="list-style-type: none"> • Required per product team. • Validate the designs proposed, user application flows. • Participates in testing the increment results every 3 weeks. • Ad-hoc validation sessions (once a sprint) • Sprint planning/review every sprint. • 2 days of testing every sprint • 1 week of testing during UAT
Adoption Champ(s) (can be user representatives)	Adult Social Work, ACHSCP	Part Time	<ul style="list-style-type: none"> • Required per product team. • Perform training. • Help others to start using new solutions productively.

Other Specific Roles for Input to Product Delivery



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Resource Title	Time Commitment	Main Tasks
Change Management	Some from Vendor / ACC	<ul style="list-style-type: none">• Internal Change to process• External Supplier Change to process• Citizen Change
Cyber Security	Depending on policies affected	<ul style="list-style-type: none">• System Security Protocol
Information Governance	Part time	<ul style="list-style-type: none">• Data Protection Impact Assessment
Data & Insights	Depending on Reporting requirements	<ul style="list-style-type: none">• Possible dashboards• Consultancy during build with regards to future proofing solutions to ensure correct structured data recording is built.

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7. Projects

A description of each proposed project is set out above. Other key features of the Portal and the Application are set out below.

Home Care Commissioning Portal

- Extending Dynamics 365 Customer Service to enable creation of a Care Commissioning Plan for client service request cases.
- Enabling Brokers to access request queues to support care provisioning.
- Assisting Brokers to assign matching providers and offer the services to them.
- Enabling Providers to access requests via a secure partner portal to accept or decline.
- Visibility of status of requests with views and dashboards
- Continuous status updates of the service request to the requestor and to the citizen

Social Work Practitioner Application

App that works on Personal Computers, tablets and mobile phones to support the following features:

- Allows practitioners to record their conversation with the Citizen using PowerApps and local device storage.
- Offline recording of client conversation is supported.
- Generates conversation recording and transcripts.
- Summarizes & formats meeting notes with relevant social care profile info and presents the content for practitioner review and amendment.
- Integration with client contact information.
- Completes social care questionnaires based on the persons' conversation data.
- Allows Practitioners to review the completed questionnaire in the backend (Dynamics 365) and amend as required.

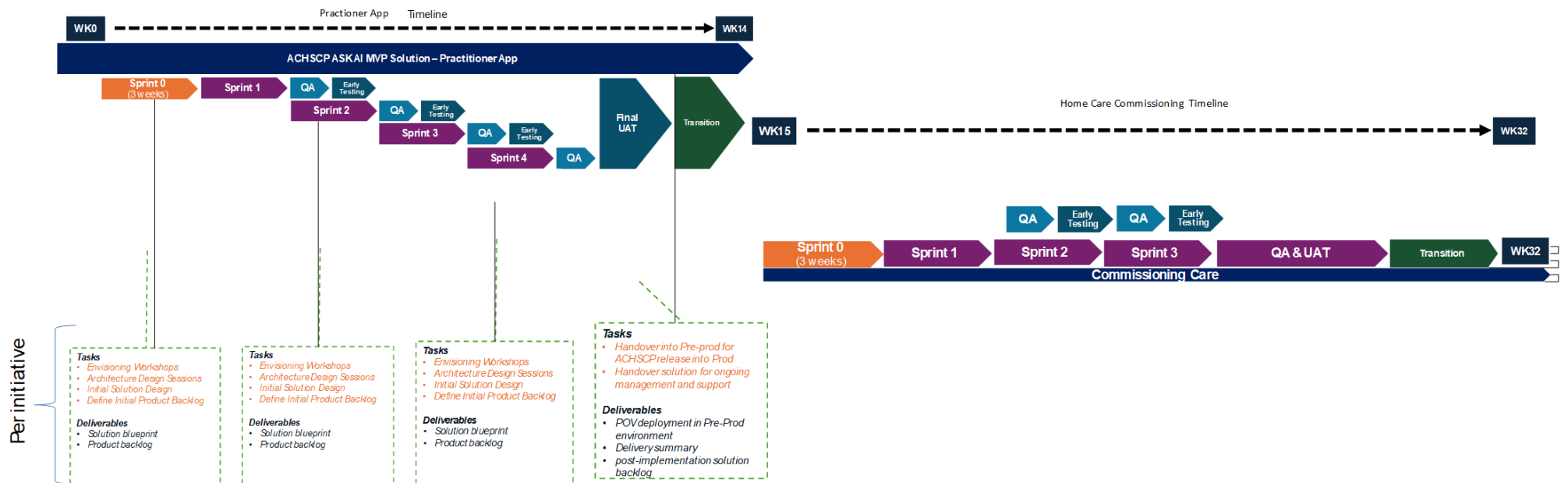


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Timeline & Delivery

The timeline for delivery is 32 weeks running one project after another. This is anticipated to commence in October 2024, subject to IJB approval in September 2024.



QA – Quality Assurance
UAT – User Acceptance Testing

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MATMG – Multi-Agency Transformation Management Group

Governance

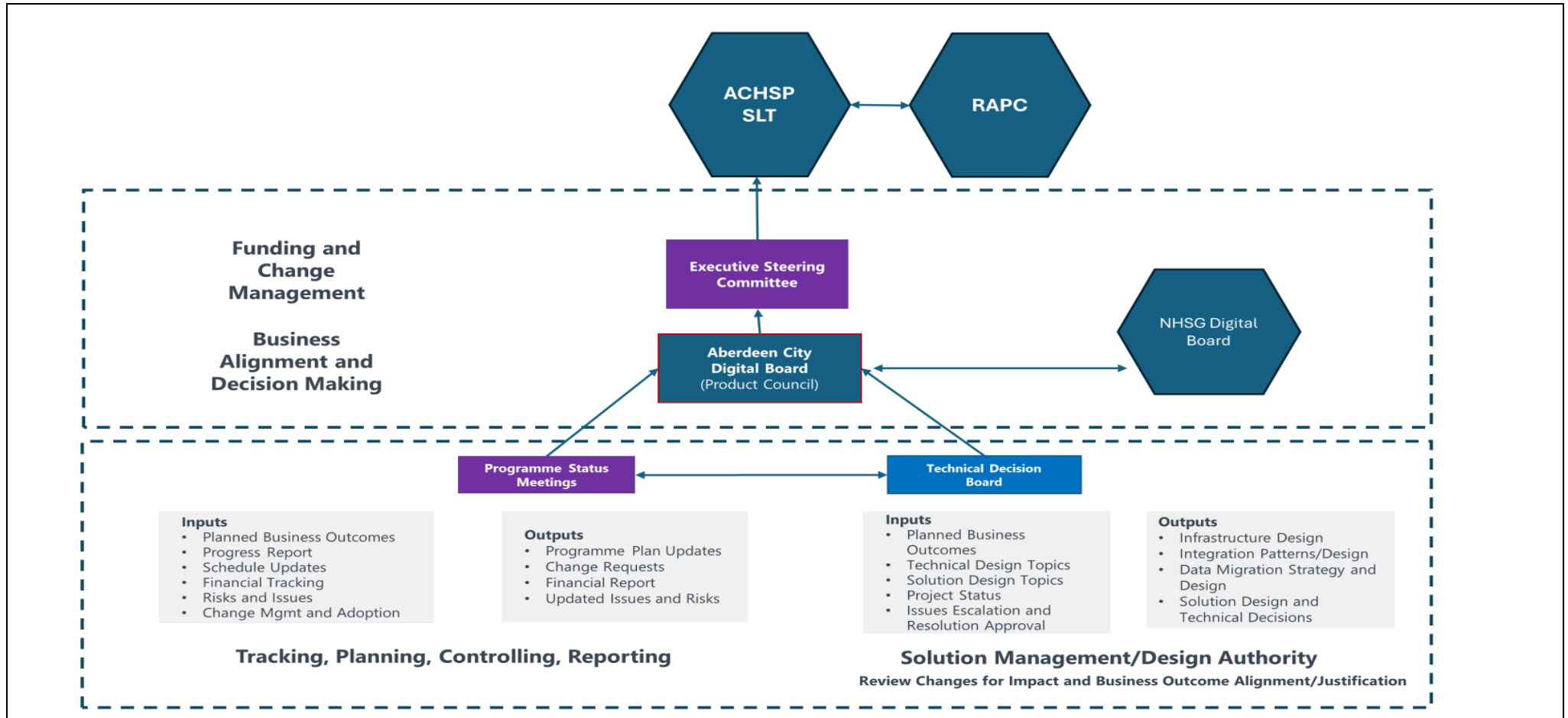
The governance arrangements to oversee the development and implementation of the two projects is set out below and would be led by the Executive Steering Committee.

An Aberdeen Digital Programme Board, with a potential relationship to the Aberdeen City Multi-Agency Transformation Management Group, is currently under development. It is envisaged that this could incorporate relevant partners from across relevant partner organisations to help ensure an integrated place-based approach to the development of digital capability in the city.



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8. Impact on Current Operational Services

A range of benefits are anticipated from each project. Key measures of success are identified below.

Home Care Commissioning Portal

Potential Business Outcomes:

- Increased value for money for provision of Home Care services contract.
- Increased and centralised visibility to customer (or Family) on status of care search.
- Increased and centralised visibility of upcoming demand per geographical area, type of service request, profile of requesters.

Leading Outcomes & Key Results:

- Decrease on % of failure demand due to lack of timely information, and with this increased value for money for care at home contacts.
- Decreased price per request on the fixed priced contract.
- Decrease on time to provide an offer.
- Increase data and insight's ability to assist with demand management.

Social Work Practitioner Application

Potential Business Outcomes:

- Increased capacity released to focus on high-value activities (e.g., addressing demand), rather than transcribing and inputting information post assessments.
- Increased Adult & Social Care wellbeing, by reducing significant manual processing.

Leading Outcomes & Key Results:

- Uptake of tool usage (% of sessions for which there is automated support via the Social Care Practitioner App)
- Feedback on use of the tool and quality of transcription draft reporting positive in % of interactions
- Reporting number of hours used on documentation, where the transcription and draft automated report has been made available.