

ABERDEEN CITY COUNCIL

COMMITTEE	Staff Governance Committee
DATE	26 June 2023
EXEMPT	No
CONFIDENTIAL	No
REPORT TITLE	Microsoft Dynamics 365- People and Change Journey
REPORT NUMBER	CUS/23/182
DIRECTOR	Andy Macdonald
CHIEF OFFICER	Isla Newcombe
REPORT AUTHOR	Lindsay MacInnes and Craig Falconer
TERMS OF REFERENCE	2.2

1. PURPOSE OF REPORT

- 1.1 To present to Staff Governance Committee the change journey to date for staff in introducing Dynamics 365 as our Client Relationship Management tool across Social Care. Also, to compliment and develop on the update given via the report to Education and Children's Services Committee in January of this year.
- 1.2. To provide background, context, and next steps for this journey.

2. RECOMMENDATIONS

That the Committee:-

- 2.1 note the change journey and the adoption and change management tools and methods used within this in embedding Dynamics 365;
- 2.2. note the engagement techniques, including end-user co-design, which have fed into the development of the tool and its roll-out as part of the overall approach to workforce engagement as we move through transformation and include these approaches in the implementation of the Workforce Delivery Plan;
- 2.3. note the meeting of our commitments within that plan, specifically around ensuring the right skills are in place, with the right support and that Empowered people will take effective decisions to meet the needs of our customers and, with the effective use of data and digital, allow limited public resources to be targeted; and
- 2.4. note that this innovative use of Dynamics 365 for Social Work has resulted in the project being a finalist at this year's Local Government Chronicle awards.

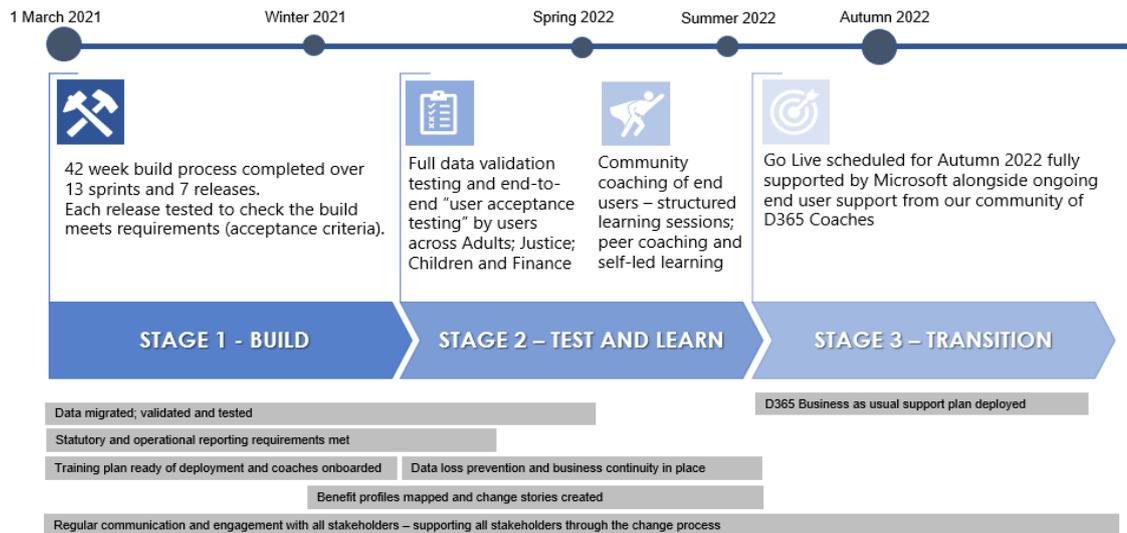
3. CURRENT SITUATION

- 3.1 In September 2018, the former Strategic Commissioning Committee gave approval for the Council to work with its digital partner to develop a new system

that would better serve the needs of social work going forward. Services sought a system which would be able to contain and bring together all types of client data within a structure that would better enable cross service working, across other key systems.

- 3.2. The replacement of the system at that time, Carefirst, presented an opportunity to further develop the Council's approach to being data led, adopting a corporate approach to customer case management. Enabling:
 - a clear understanding of how current line of business customer systems are used and exploring alternative enabling technologies to drive modernisation and transformation.
 - a platform for the future delivery of customer applications, including the capabilities and benefits of a unified, integrated solution and maximising investment and driving better outcomes.
- 3.3. The Council's partnership with Microsoft provided the opportunity to work with stakeholders and system users to modernise and transform our social work data system using Microsoft technologies. In 2019, Microsoft were commissioned to help us implement Dynamics 365 across all social work functions. Dynamics 365 is a set of intelligent business applications used to deliver enhanced results through predictive, AI-driven insights, across services.
- 3.4. Deploying Dynamics 365 to meet our requirements at ACC also gives several specific advantages. From a frontline care worker's perspective, it transforms the way that we record, access, and share information across the business and with service users. From our citizens' perspective, it will give them more involvement, more interaction and greater transparency in the service they receive. In relation to our managers, it means they can better use data to make decisions, allocate resources and deliver services to best meet the needs of the most vulnerable – moving further towards predictive rather than reactive care.
 - 3.4.1. The system has built-in business process flows (BPFs), which help employees to navigate through our internal processes. For example, Dynamics uses mail-merge principles to pull pre-populated client data into form templates – for issuing to partners and suppliers, meaning that employees can reduce their admin time to focus on clients, and the organisation can reduce the risk of a potential data breach. Dynamics 365 is designed to work on the go, so employees can input and update the system whilst working, using their laptop, 2-in-1 device or work mobile phone. Service users can, in turn, be more involved in collaborating and participating in the writing of their records.
 - 3.4.2. Technically the business has moved from having social work transactions and data on 9 systems to one, with all functionalities being delivered within the 365 Power Platform. This has also enabled the adoption of a common data model which facilitates a single definition across the platform for citizen, worker, case, assessment, review, chronology etc.
 - 3.4.3. The design and implementation took place over 12 x 3-week sprint cycles, designing the internal user journeys required for delivery of a 21st century social work service.

Project Timeline



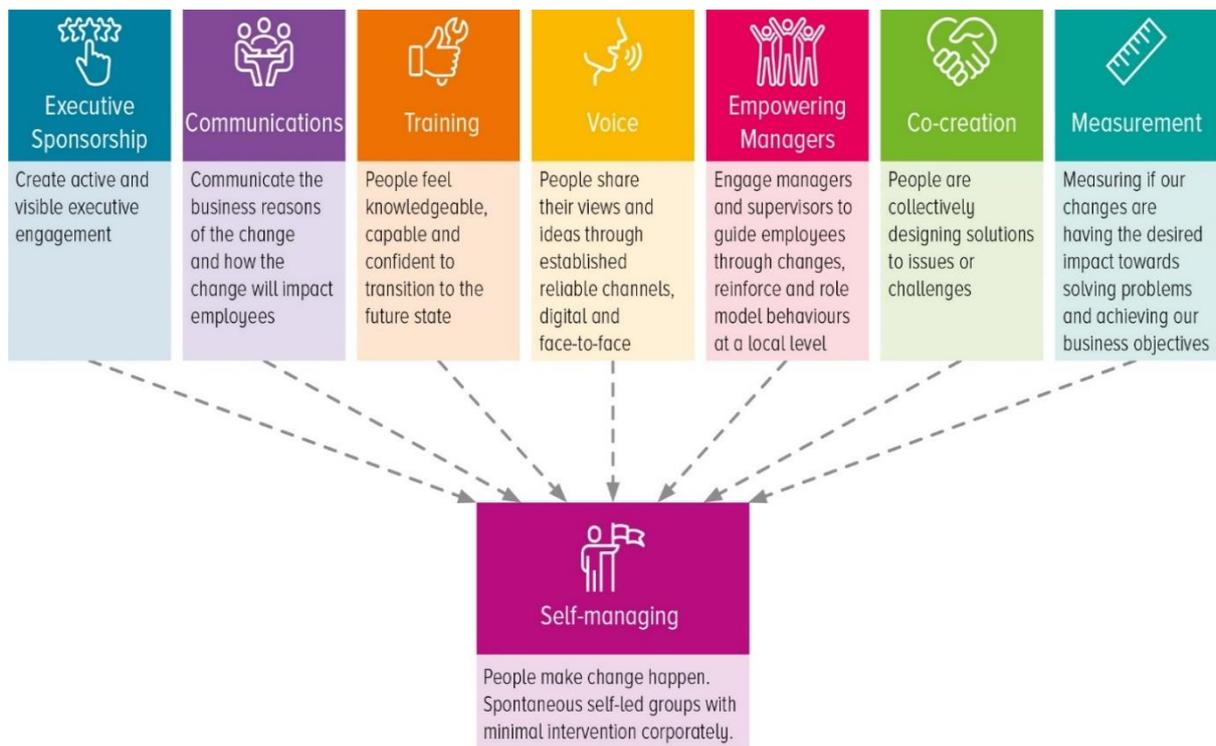
- 3.5. Whilst realising and capitalising on the cross-cutting functionality, first and foremost the development of Dynamics 365 was to build a data system that more effectively met the needs of social work and social workers. Consequently, the voice and needs of those who would use the Dynamics 365 system was critical to its design and build. Alongside this, colleagues within Digital & Technology cluster also developed within these new ways of working to deliver user-led, continuous improvement.
- 3.6. While social workers had the subject matter expertise, the development of Dynamics 365 was a true multi cluster and multi partner project. The technical skills and expertise of Microsoft and Hitachi along with the connectedness of colleagues from the Finance, Digital and Technology, Data and Insights and People and Organisational Development clusters has been critical to ensuring the successful delivery of the Dynamics 365 system. This approach has ensured that we have a sustainable model to support the workforce, including new staff, to build their skills and knowledge of Dynamics 365 in an increasingly self-serving approach.

4. WORKFORCE ENGAGEMENT AND CO-CREATION IN THE CHANGE

4.1. How have teams and individuals been helped to prepare for this change?

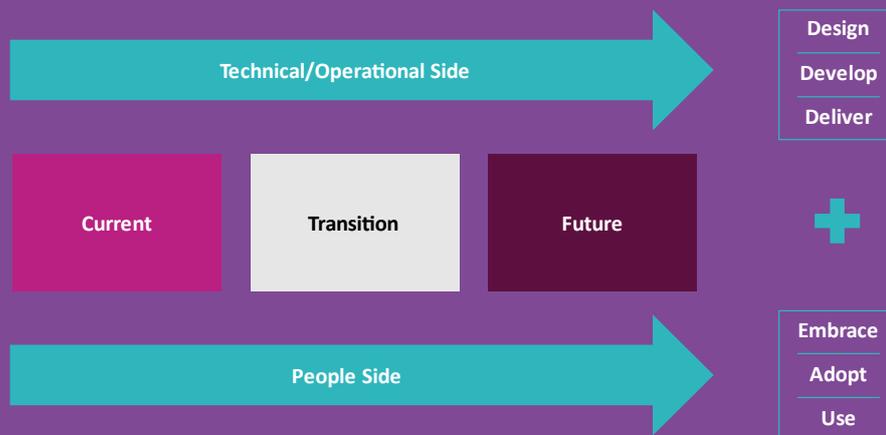
The project team worked closely with service teams to support them through this change and applied our adoption and change management (ACM) pillars (as referenced in our Workforce Delivery Plan). This overall approach is adapted from the key learnings gained within our first engagement with Microsoft as our digital partner and has fundamentally improved the way we deliver change.

These pillars are central in targeting our support and interventions.



4.1.1. Social work practitioners were fully involved in design and development. Three full-time “Product Owners” were within the partnerships on the project and led this work from within Social Work, in representing their own 3 respective services of Children’s, Adults’ and Justice services. Before the project was fully mobilised, the Social Work teams mapped out their 93 top level processes and, during the sprint elaboration, these developed into 483 user stories which allowed social workers to specify their own needs for the system. At the end of each sprint, the unit level testing was completed before 90 Dynamics coaches, who were volunteers from social work services, carried out over 400 scripted user acceptance tests as well as providing key peer support. The coaches are well placed to identify “fixes” on the system and work with the technical experts to resolve this in an approach that prioritises future developments.

ACC Change Management



Successful change requires both the technical and people side

4.2. Executive Sponsorship

From the outset, the project has been spearheaded by the Director and the Chief Officers of Children's and Adults Social Work, Digital & Technology, Finance and Data & Insights – actively through involvement in Project Board key decision-making and visibly through leading regular manager briefings and issuing update blogs to keep teams informed and engaged.

4.3. Communication

Throughout the programme of work, users and the wider community have been kept informed through the Digital Workspace area of the Intranet. We have posted regular project updates, shared “sneak peeks” of the system and short training clips.

4.4. Training

4.4.1. At the beginning of the project, 300 learners were surveyed from the end user community. Results showed that roughly 70% of learners prefer live online training – explaining that it ensures they have dedicated time aside for their learning, which they can complete with colleagues. Learners and Subject Matter Experts from the service advised that sessions should be no longer than 3 hours in duration, for ease of scheduling and engagement. This data informed our approach in rolling out the learning.

4.4.2. The Coach Approach- In response to the survey feedback, and with the successes of our Digital Super Champs model in mind, a coach approach was adopted - onboarding 75 coaches across the 3 services: Adult Services, Children's Services and Justice Services.

- 4.4.3. The Coaches underwent a series of “Train the Trainer” sessions with our partner Hitachi, who were closely involved in the design and development of the system. The Coaches were also offered the opportunity to take part in a “How to deliver engaging training session” – a virtual session delivered by colleagues in People Development. Further support has continued to be offered to Coaches to develop their skills professionally through a Coaching workshop delivered via NESCol. The Coaches both provide training for their peers and are actively involved in supporting the change management effort, championing the system within their teams.
- 4.4.4. System training has all been delivered through either virtual or face-to-face in person training events. In line with the launch of the new system, key areas were also identified for employees across the service to develop their practice, notably in how they write and how we secure personal data. The project team worked with service teams to scope out eLearning modules to cover “Data Protection for Social Work” and “Recording Principles”. These are self-paced modules that learners can fit around their day-to-day, with the latter course being integral to the work that multi-agency teams continue to do to embed these principles and ensure the presence of the client’s voice in their record.
- 4.4.5. Training was consistently followed up with evaluation by delegates. Feedback included:
- Good list of resources for further learning and more detail.
 - The importance of recording accurately, sensitively and relative information for the needs of the individuals I work with.
 - In depth understanding of how information is recorded and used can affect clients.’
 - Enforcing the fact that you need to record the persons voice in that, their words, and also non-verbal language.

4.5. Voice

- 4.5.1. Two-way communication has been prioritised from the outset - with shared and service-specific Microsoft Teams sites in place for all staff as well a dedicated Yammer community for colleagues to ask and answer questions; suggest improvements and share knowledge, as well as opportunities to do this on our Intranet’s Digital Workplace pages with the wider workforce.
- 4.5.2. Dedicated update meetings took place with trade union colleagues on the progress and stages of the project. These received positive trade union feedback, including regarding the management of the change and the level of end-user involvement.

4.6. Empowering Managers

- 4.6.1. Regular Manager Briefing sessions continue to be in place to empower people managers, provide essential updates on the project and ensure 2-way communication is in place with them and their teams.

4.6.2. Managers briefings have been well-attended, and these sessions have been used to cover a wide variety of topics, to equip managers with the skills and knowledge to support their teams.

4.6.3. Examples of Topics covered:

- Project Update and Cutover Plan – regular updates on the timeline
- Go Live Checklist – Preparing for go live and their steps for day one and week one
- Managing Change, Uncertainty and Wellbeing – how to recognise any issues and support teams through
- Your Role as Managers in Change

4.7. Co-creation

The system has been designed and delivered in partnership with those that will use it. In the early stages of the project, a series of workshops were convened to scope requirements; these were prioritised against, and released throughout, each of the builds. After each phase of the build, a playback session was run in conjunction with Microsoft, which checked through the functionality and gave our internal teams the opportunity to provide feedback and input and ensure the design was user-led.

4.8. What have been the lessons learned?

4.8.1. With a change of this magnitude, including the user-led, continuous improvement approach to the project being new to all, it is to be expected that some aspects will require increased support and communications to further their confidence and ability. Alongside this, the project team learned the benefit of involving affected roles at the earliest possible juncture.

4.8.2. Sentiment Surveys were regularly issued and monitored—to gauge the general appetite for change as well as awareness and confidence levels. Where there have been specific issues flagged, P&OD team members have reached out to Service Managers to identify additional means by which to support specific teams.

4.8.3. As anticipated, there were some technical challenges to overcome – this resulted in changes to the overall project timeline. This change was managed with the services themselves, including timely updates re these changes and, in some cases, this allowed additional time to prepare teams for the change and an extra buffer for training.

4.8.4. Dynamics 365 went live on 17 October 2022 and, as the project team accelerated towards that date in the final preparation stages, there was a transitional move over from the design, develop and delivery phases to continue to work closely with the people in helping them to embrace the change; adopt the solution and further optimise processes, using the digital solution wherever possible.

4.8.5. Feedback during this has shown, as anticipated, that time and experience will bring increased confidence and familiarity with the system. Whilst working to

ensure the system becomes embedded, the project has recognised that Social Work colleagues are now establishing new norms and ways of working, and the D365 infrastructure allows for build and rebuild where needed, alongside this.

4.9. Post Go Live Impact and Next Steps

4.9.1. The co-creation of the tool and the agile nature of the system itself have meant a significant change for staff. With the product being now in its continuous development phase, social work practitioners are leading the prioritisation of features as product owners. As we move forward with the full delivery of the tool, we are committed to maintaining an approach to change which is inclusive, supportive, and engaging, with ownership for change sitting - wherever possible- with those whom it impacts. The management of change, communication and engagement will continue to include tracking against our 8 pillars, which ensure that this is the case. Engaging with staff to enable their transitioning in the support team model is well underway in terms of aligning to the continuing strategic direction and ensuring the specialisms are in place. As we unlock improved reporting tools and insights from data in real time, we can continue to identify and improve service delivery using emerging trends. One example is the continued development of our recording principles, using the benefits of the system and designing the standards alongside service users.

4.9.2. As we move out of a project approach to ongoing ACM, we continue to build upon the foundations from the project to ensure the reinforcement of the change and the return on investment. This includes developing our Intranet guidance further to give colleagues quicker access to key information, maintaining work with Product Owners in confirming that the training guides capture the system advancements, and adapting our coach community to grow in line with these changes.

4.9.3. Aberdeen City Council's innovative use of Dynamics 365 for Social Work has resulted in the project being a finalist at this year's Local Government Chronicle awards. The common data model and user led design have also attracted interest from the Digital Health Institute who are keen to exploit the work done in Aberdeen to advance their development of citizen data vaults.

4.9.4. The Dynamics platform aligns with the council's objectives to rationalise and simplify its business software to reduce cost and complexity, as well as creating space for innovation; work is already underway through the Transformation Programme in expanding its use and maximising the benefits of a joined-up platform.

5. FINANCIAL IMPLICATIONS

5.1 There are no financial implications to this report in terms of the change management approaches utilised, the project has been delivered within allocated resources.

6. LEGAL IMPLICATIONS

6.1 None.

7. ENVIRONMENTAL IMPLICATIONS

- 7.1 The project includes elements of addressing awareness and behaviour change which will have environmental impacts and sustainability and therefore are an enabler to the Council's approach to achieving net zero.

8. RISK

Category	Risks	Primary Controls/Control Actions to achieve Target Risk Level	*Target Risk Level (L, M or H) *taking into account controls/control actions	*Does Target Risk Level Match Appetite Set?
Strategic Risk		This approach mitigates against the risk of the non delivery of the council's objectives	N/A	N/A
Compliance		As above	L	Yes
Operational		As above	L	Yes
Financial	A lack of adoption of the tool will result in the Council not reaping the return on the investment	This approach mitigates against the risk of the non delivery of the council's objectives	N/A	N/A
Reputational		As above	L	Yes
Environment / Climate		As above	N/A	N/A

9. OUTCOMES

<u>COUNCIL DELIVERY PLAN 2023-2024</u>	
	Impact of Report
Aberdeen City Council Policy Statement <u>Working in Partnership for Aberdeen</u>	Adoption of the tool and the resulting improved, joined up data/records on our customers, support the intention to enable positive futures for our city's young people. All other aims are supported by developing our workforce holistically.
<u>Aberdeen City Local Outcome Improvement Plan 2016-26</u>	

Prosperous People Stretch Outcomes	By meeting the health and emotional wellbeing needs of our care experienced children and young people they will have the same levels of attainment in education and positive destinations as their peers by 2026 By enabling Social Workers to have more time with clients, more joined up records in insights and less of an admin burden- the Dynamics 365 implementation will feed directly into the attainment of this outcome.
Regional and City Strategies	Ensures we have the capability internally to deliver on these regional and city strategies

10. IMPACT ASSESSMENTS

Assessment	Outcome
Integrated Impact Assessment	Full impact assessment not required – following stage 1
Data Protection Impact Assessment	Not required
Other	Not required

11. BACKGROUND PAPERS

[Write Right About Me: Aberdeen’s multi-agency records improvement work | Aberdeen City Council](#)
[Link to Education & Children Services Committee Report: Implementation of DYNAMICS 365/Replacement of CareFirst](#)

12. APPENDICES

None.

13. REPORT AUTHOR CONTACT DETAILS

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