

Aligning to the Core Value Steps in an Adult Social Care Setting



From Possibility...

BACKGROUND

All organisations evolve and subsequently, processes change to meet customer and business needs. The challenge is to ensure that the processes stay Lean and staff maintain focus on delivering the value steps for their customers. As part of its implementation of Putting People First, the London Borough of Barnet (LBB) Adult Social Care and Health had developed and implemented a new business model which put personalisation at the heart of the service. To build on this work and to ensure the case management processes were as efficient as possible LBB decided to take a Lean Systems Thinking approach to service delivery. This involved initially focusing on the end-to-end case management process for older adults and physical and sensory impairment clients. The project would be in two phases and we were instructed to deliver the first, which would culminate in a tested approach and an implementation plan for consideration and move into phase 2.

There were many influences on this piece of work. The project needed to reflect LBB's Corporate Plan which provided the framework for the strategic priorities for the year ahead. This included 'Sharing Opportunities and Sharing Responsibilities' (increasing self directed care), 'Better Services with Less Money' and 'A Successful London Suburb' (communities supporting all members of society). Central also to the Corporate Plan, is the concept of a 'One Public Sector approach' with the need to work in even closer partnership with NHS Barnet to increase the scope of joint commissioning and shared leadership. Other priorities included doubling the number of service users with a personal budget and achieving a roughly 20% cut in expenditure over the next three years to meet the Medium Term Financial Strategy (MTFS).

It was a busy time for LBB with a number of other ongoing projects in Adult Social Care and Health (ASCH), with which it was essential that this project was aligned. Other improvements strands included:

- Right to Control – working with Job Centre Plus, the Office for Disability Issues and Barnet Centre for Independent Living to align the access, assessment and provision of various funding streams for vulnerable adults
- TCES - moving to a retail model of equipment provision
- Centre for Independent Living - developing the access arrangements and roles of non-professionals in the care management journey

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- Information, advice and brokerage – retendering the services
- Creating an Online Portal for supported self-service – extending the Social Care Connect website to allow supported self-assessment and support planning, and to directly procure elements of care and support
- Replacing the Adults Social Care and Health database



In terms of scope, Phase 1 of the project involved the following:

- A review of the end-to-end case management process for older adults and people with physical or sensory impairment, and identification of all barriers to an effective and efficient operation
- Identifying potential improvements in the quality and efficiency of service at all stages of the process, with some testing
- An introduction to Lean skills for Managers and Team Members across the relevant teams to establish some independence by the end of Phase 1
- Development of an implementation plan and acceptance by Managers of the need for the implementation phase.

OUR APPROACH

As LBB had identified this project as an initial move towards implementing Lean it was important that the wider teams and Line Managers had some knowledge of Lean Systems Thinking. We ran a number of sessions for teams alongside the project to provide a foundation on which the Senior Team and Core Lean Team could build in the future.

It was clear that this was a complex project in terms of influences and range of stakeholders. Working with a team of staff members who became the Core Lean Team we jointly undertook a diagnostic to get a full picture of how the process currently worked. This included spending time with the members of the wider team, mapping the 'As Is' process (example below) and collecting and analysing data.



The diagnostic work showed that the ASC team was engaged in a complex array of activities. Areas ripe for improvement included:

- Establishing an end to end approach to case management with greater coordination between the different sections
- Better aligning the financial process to the care process
- Ensuring the right information was easily accessible to the right person at the right time
- Reducing the number of diversions from managing the process

- Developing understanding of KPIs and realigning these measures with the core value steps
- Reformatting performance information to provide Team Managers with tools to enable effective team planning of work and management of the process
- Harnessing and consolidating the various feedback mechanisms with customers

In addition, it was recognised that a more robust, transparent and accessible change management process would help embed these changes.

To Actuality...

The revised process

There are three stages of improvement. To standardise, enhance and innovate. At LBB the case management process had evolved, become more complex and moved away from focusing on the core value steps. There were a number of steps we needed to take to refine the ASCH case management steps and standardise ways of working. Again, working closely with the Core Lean Team the first step was to develop the new process map which focused on the core value steps for the service user.

Developing improvement

In addition to the revised process, the Core Lean Team identified a number of areas that were wasteful and contributed to the time being taken in diverts away from the value steps. Some examples:

- Waiting list reports – Team Managers were spending a considerable amount of time interrogating waiting lists to establish any changes in circumstances. The core team proposed a number of reports produced centrally by the performance team which now provide a concise and drillable summary of the information needed.
- Support package approval - Staff spent disproportionately lengthy amounts of time preparing to present cases to Panel with duplicated information across paperwork. The team have now agreed more appropriate devolution of budget to Team Managers, rationalised paperwork and new methods for budget monitoring at this level.
- Equipment repairs requests – Service users' requests for equipment repairs would pass through 2-4 people including care management approval, even though the provider could handle these requests directly.

Information Centres

Part of the proposal (embraced with enthusiasm by LBB) was to establish Information Centres throughout Adult Social Care as a way of improving performance and the management of processes locally and to develop cross team problem solving. An Information Centre is a visual tool (usually on a large board) that contains all key performance data for a team. It is used to display performance against key measures and to review and communicate metrics, concerns and improvement activities as well as the wider context for the work – the longer term vision and value stream map. We worked with several teams and supported them in setting up Information Centres. Further support and development is now being provided internally by the Core Lean Team.



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BENEFITS

LBB's intention was to introduce Lean Systems Thinking as a way of managing change within ASC. This did not involve major innovation at this stage but a realignment of focus on the core value steps. Although our brief was to deliver an implementation plan with the Core Lean Team, some of the improvements are already in progress. In terms of benefits, LBB now have the following:

- An implementation plan that addresses the key process, infrastructure and cultural changes needed.
- A Core Lean Team who are trained and able to internally manage the implementation of improvements and support the development of Information Centres
- Focused, cross functional application of Lean and problem solving
- A collection of front line reporting tools to enable Managers to manage
- Information Centres up and running across the service – improving performance focus & communication

LBB are now moving into the implementation stage. If all the improvements are implemented there is the potential for initial savings of £470k and a smoother, safer and more service user centred approach.

As one Team Manager put it:

'We now have a safety net through which no client will fall'.

FURTHER INFORMATION

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