

# Education and Children's Services Overview and Scrutiny Committee

5 January 2016

## Replacement Social Care Management System - Mosaic Briefing Note on the Current Progress and Financial Position

### 1 Background

To address the recommendations of the Children's Ofsted inspection in 2013, a replacement for the Paris system (which is utilised by Children's Social Care and Adult Social Care to hold case management details) was approved. Initially focusing on Children's requirements, a single system for Children's and Adults Social Care was procured. Corelogic's Application called 'Mosaic' was selected with a view to implementing the system as a 'Best Practice Configuration' as quickly as possible.

The Mosaic programme was initiated in June 2014 by the Interim Executive Director Rose Collinson with the objective of a rapid deployment of the standard build Mosaic system. A Programme Manager and project team were appointed and workshops facilitated by Corelogic captured changes to tailor the system to Walsall's needs.

From the procurement process, the high level plans initially outlined an anticipated delivery of the system during December 2014 /January 2015. This rapid deployment approach carried a level of risk, as the average implementation timescale for a comparable system install is known to be 15-18 months duration.

On review of the progress being made in November/December 2014 it was apparent that successful 'go live' could not be achieved within the original timescales and that the scope and terms of reference outlined in the previous approach not appropriate and exposed risks which could impact the quality of the system. The programme team changed and an internal programme team was assembled, coordinated by Business Change and supplemented with practice experts from the business, with the recruitment of a Technical Implementation Manager following in February 2015.

The decision was made by the Programme Board that there would be a joint implementation go live for both Children's and Adults and it was anticipated that a revised go live of 1<sup>st</sup> April 2015 was achievable.

The Technical Implementation Manager produced a detailed delivery and resource plan which outlined the full complexity of the tasks involved in a major system and data migration implementation. This planning activity evidenced that delivery could not be achieved for April, however Phase 1 of implementation, relating to case management for Fostering and Adoption could be delivered in May 2015. This was achieved with the IT infrastructure being installed and configured and over 60 staff from Children's Services being trained to use the first part of the Mosaic application. This part of the system is being utilised and has been live since May 2015.

The revised Programme Plan for Phase 2, relating to case management for the remainder of Children's Social Care and for all aspects of Adult Social Care, gave the Executive Directors and Programme Sponsors – roles which subsequently moved to David Haley and Keith Skerman, clarity about the stages of delivery,

resource requirements and management of safeguarding risks – all in the context of service and cultural change, which was not part of the original scope of the programme under Rose Collinson's sponsorship.

The revised plan was based on:

- A fully resourced delivery team being mobilised (both technical and practitioner)
- Clarity of the system change requirements in line with the way the business changes are being implemented
- Co-ordination of development activity with Corelogic
- Data migration scope based on safeguarding needs
- Systems support capacity
- Active risk and issue management

The plan was costed and approved by the Programme Board in April 2015; dedicated resources came together with the appointment of an external Programme Implementation Manager in June 2015. The programme delivery team (21 full time dedicated staff and up to 15 part time) was established and comprised of practitioners from Children's and Adults, technical IT staff, performance officers, project managers, trainers, testers and experts who have experience of working with an implementation of this size and complexity, all working together with external expertise and support from CoreLogic.

In the context of major business change, there has been significant commitment from the service areas affected to enable full time release of staff into the programme team and cooperation with services to respond to the requirements of the programme in terms of design of the system, documentation of processes, data cleansing and migration, testing and training. But without this commitment there was a significant risk that the programme would not succeed.

The programme delivery team has been working to achieve the challenging timescales within the expected timeframes for a normal implementation of such a system.

Original timescales for implementation were based on a 'simple' implementation which would utilise as much as possible Corelogic's best practice configuration. As the council learnt more about the new system, it became apparent that the standard 'out of the box' configuration was not going to work for Walsall. To implement it 'as is' would have created many more problems later on post go live. Therefore the decision was taken with full understanding of the Programme Board to spend the time and effort now to create a business change solution which is fit for purpose for Walsall's business needs.

This is a significant and complex piece of work which will impact on over 1,500 staff within the council and seeks to migrate 10,000 'live' service user case files and all their attached information (in excess of 450,000 records/documents). It would not be viable to implement something quickly and untested which could impact on the safeguarding of vulnerable children and adults.

Currently there are over 100,000 historical service user case files on the system with over 2 million attached documents held in Paris which need to be verified, extracted and assigned to the reformatted and migrated records in Mosaic.

There is a strong governance arrangement in place, with the Programme Board meeting every two weeks to review progress and to address the risks and issues as they arise. The Executive Directors for Children's and Adults are the sponsors for the programme and chair the Board. Feeding into the Programme Board is an Operational Steering Group, comprising representatives from the practice, performance and systems and this group drives forward the initiatives, resolves issues and gives assurance to the Programme Board.

The programme has a detailed delivery plan which is closely monitored by the Programme Board which has representation from Children's, Adults, Finance, IT and Business Change.

Phase 2 – Children's Case Management, Adults Case Management and Children's Finance went live on 23 November 2015. In preparation for 'go live' over 600 staff from Children's, Adults and Finance were trained over an 8 week period. Training provision continues post go live.

A dedicated support team has been implemented to field calls and enquiries from system users, with technical support and advice provided from the council's ICT Service and backed up by the supplier CoreLogic.

For 2 weeks following 'go live' there has been super user and "floor-walking" support at all the main council sites where people are using the system. Early indications are that it has been a successful transition to the new environment.

As the new system beds in, the focus of the Mosaic programme will turn to the planning and resourcing for Phase 3 which will introduce more automated forms of payment and transactions updating directly to the council's financial system from Mosaic. There are also aspirations for further enhancements which the system can deliver e.g. mobile working and these will be developed on a case by case basis.

At a previous Scrutiny Panel members highlighted the fact that programmes and projects of such complexity as this one often drift and extend their timescales. Detailed planning can assist in keeping activities on track and to budget.

As described above, this has been and continues to be a complex and multi faceted piece of work with many dependencies and in some instances challenges which require attention and resources which could not have been foreseen at the outset. The Programme Board is closely monitoring and managing this work and they share the common objective of reducing the risks associated with implementation to deliver the new capability safely and effectively. Evidence shows that attention to detail and effort prior to go live in these types of implementations leads to more successful outcomes post go live.

## **Financial Position**

The financial position of the Mosaic project is summarised in table 1, with a detailed narrative on this position set out overleaf.

**Table 1 – Summary of Mosaic Financial Position**

<b>Directorate</b>	<b>Original Budget (£m)</b>	<b>Allocation of Additional Funding (£m)</b>	<b>Revised Budget (£m)</b>	<b>Current Forecast (£m)</b>	<b>Current Variance to Revised Budget (£m)</b>
Children's	1.100	0.550	1.650	1.615	(0.035)
Adults	1.288	0.200	1.488	1.458	(0.030)
<b>Total</b>	<b>2.388</b>	<b>0.750</b>	<b>3.138</b>	<b>3.073</b>	<b>(0.065)</b>

The original capital budget for the implementation of Mosaic was £2.388m. This was made up of £1.1m of mainstream capital funding for the Children's build, and £1.288m of adult social care capital grant funding for the Adults element.

Due to the scope of work, extension of the original timetable and the identification of additional resource requirements to support a successful implementation, a revised implementation and resource plan has been completed and approved by the Mosaic Programme Board.

Following this the forecast costs for the Children's element are now expected to be £1.615m. This would lead to an increase in costs against the original capital budget for the Children's build of £515k.

The current forecast costs for the Adults element are £1.458m. This would lead to an increase in costs against the original capital budget for the Adults build of £170k.

To support this increase in forecast costs additional resources of £750k of Council mainstream capital funding has been allocated to the project during 2015/16. Therefore the revised budget for the programme is currently £3.138m.

This increase was funded via the use of a further Adults social care capital grant that was received for 2015/16. A request was approved by Cabinet on 22 July 2015 for this grant funding to be utilised to fund the 2015/16 capital programme for Aids and Adaptations. As part of the 2015/16 budget the Aids and Adaptations project was originally allocated £750k of Council mainstream capital funding. The replacement with grant funding therefore enabled the mainstream funding to be allocated to the Mosaic project.

## **2 Reason for Scrutiny:**

- 2.1 To provide an update on the implementation of a new electronic social care management system (which went live on 23<sup>rd</sup> November 2015) for Adult Social Care and Children's Services to replace the current Paris system.

## **3 Recommendations:**

That The Scrutiny and Performance Panel are recommended to note the contents of this report.

## **4 Background Papers**

Previous update to the Education and Children's Services Overview and Scrutiny Committee held on 15 January, 2015.

## **5 Resource and Legal Considerations**

5.1 The programme cost model has been developed with Finance and is reviewed regularly by the Programme Board.

## **6 Citizen Impact:**

6.1 Whilst there will be no initial disruption to or impact upon citizens, the replacement social care management system will enable improved performance management and will be the primary electronic tool, enabling increased utilisation of business intelligence to inform business decisions.

## **7 Environmental Impact:**

7.1 None

## **8 Performance Management**

8.1 Performance management requirements have been scoped within the new system.

## **9 Equality Implications:**

9.1 Equality implications have been considered as part of the system implementation.

## **10 Consultation:**

10.1 Consultation was undertaken as part of the procurement exercise and engagement with stakeholders has continued throughout the implementation as part of the communications plan for the programme.

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