Working Group
Digitalisation of Social Services

Berlin
17 – 18 October 2019

Welcome session

Christian Fillet, Chair, European Social Network

Cornelia Markowski, Head of Department for International Relations, German Association for Public and Private Welfare

Introductory session

Alfonso Lara Montero

Chief Executive

European Social Network

European Social Network – Our Activities

- **Who are we?**

  - 138 Members
  - 36 Countries

- **How do we work?**

  - Annual programme co-funded by EC
  - European Social Services Conference
  - Membership activities:
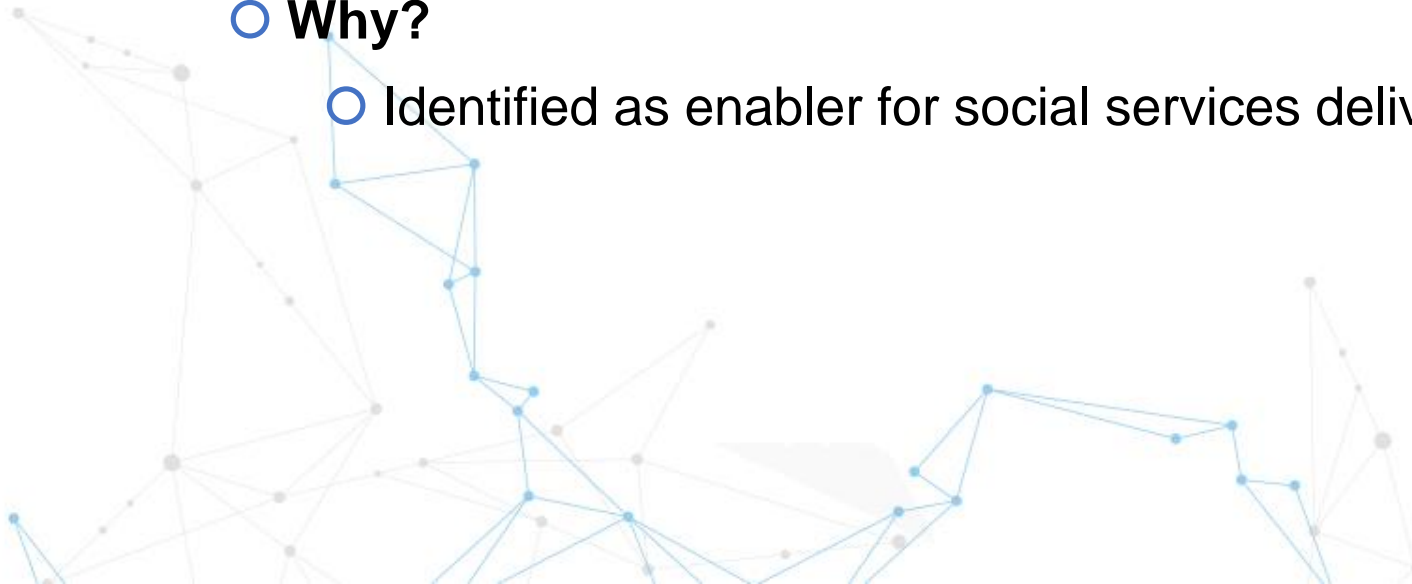   - European Social Services Awards
    - Training

Technology in Social Services

- **How did the working group happen?**
  - Priority for members
 - Came up in Members forum
  - Included in current strategy

- **Why?**
  - Identified as enabler for social services delivery

Technology – ESN work

Publications:

- Investing in the Social Services Workforce
  - Technology as a means to ease administrative burden
  - Increases workforce efficiency
  - Technology to assist front line staff in carrying out care tasks

- Social planning at the local level
  - Technology for data collection and analysis
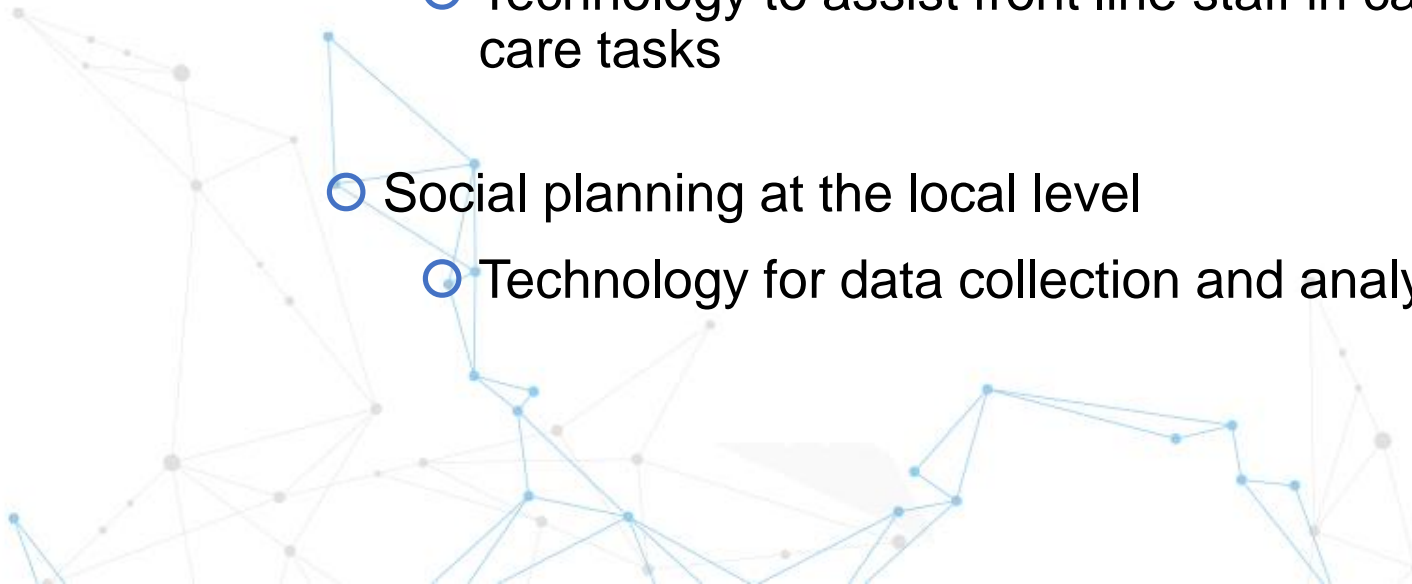
Technology – ESN work

Events:

- Malta - Technology as a theme of innovation

  - How can technology be used as an enabler in creating a more inclusive society?

- Milan – From quality of care to quality of life

  - Technology driven solutions for better care: AI, integrated case management solutions

- Hamburg – Rethinking Community Care

  - Use of technology in delivering community care

Digitalisation and Technology Working Group

- **Questionnaire launched**

  - 38 applications received (Popular)

  - Key themes identified as focus of each meeting

- **Working group series**

  - Data and Case Management

  - Assisted Technologies

  - IT for Decision Making

Meeting 1

Data and Case Management

- 60.00% selected this as topic that should be explored in working group (highest %)

- 68.42% indicated that data and case management systems were a very important priority

- 63.16% indicated that systems for integrating data between departments/organisations was a very important priority

- Two most important outcomes highlighted

    - Increase in service user quality of life (33%)

    - Increase in workforce efficiency (33%)

- Privacy highlighted as major concern

Outcomes of the Working Group

○ **Aims of group**

  ○ What do you expect from the WG?

  ○ What product would be useful for you?

○ **Some ideas**

  ○ Exploring benefits and limitations

  ○ Learning about experiences, best practice

  ○ Policy briefs

  ○ E-Guide Best practice collection

Setting the scene: The digitalisation of social services

Dr Amanda M L Taylor-Beswick

Social Work Academic

Queens University Belfast, United Kingdom

DIGITALISATION, SOCIAL SERVICES, SOCIAL NEED

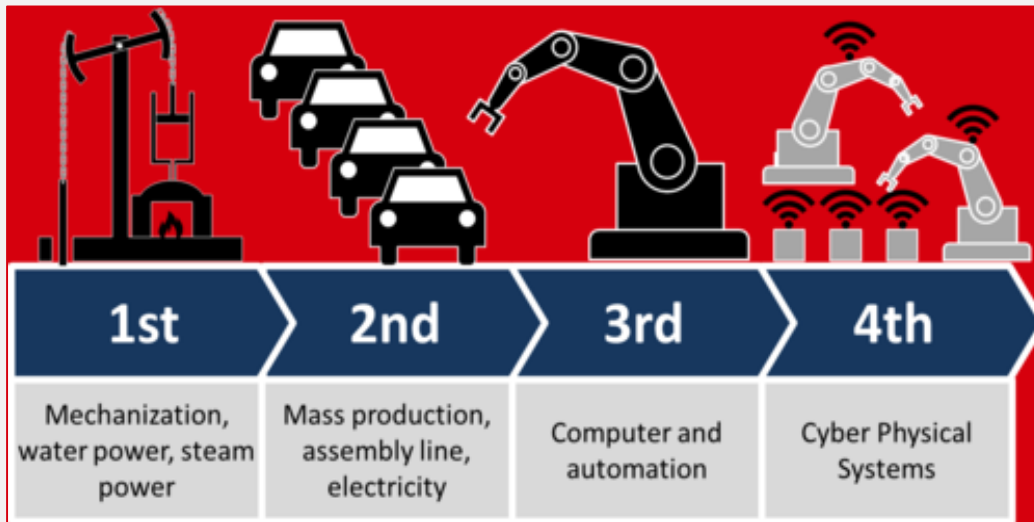**DR AMANDA M. L. TAYLOR**

School of Social Sciences, Education & Social Work

European Social Network 17TH OCTOBER, 2019

QUEEN'S
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BELFAST
EST 1845

Industry, Lived Experience, Social Need

"it is imperative to explore where we have been in order to enhance our perspective of where we are going and what we must do to get there"

(Schoech, 2014).

"The work of husITa is to convince... [how] inaction would result in resources being placed elsewhere and [that] the ill-informed applications of IT would result in systems which do not model human service value systems'"

(1987, in Ballantyne, 2017).
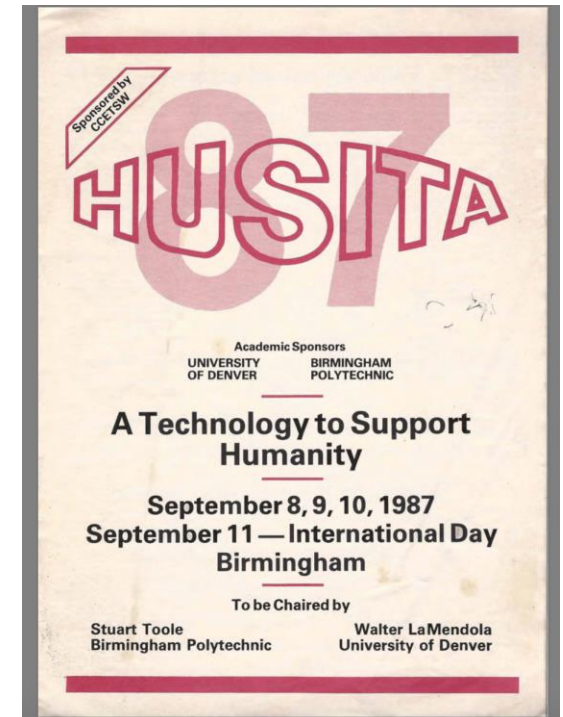
"At the initial gathering of husITa in 1987 we committed ourselves to "A Technology to Support Humanity," - that aspiration remains an even more formidable challenge today. Back then we had little idea of the technology developments that would overtake us"
(LaMendola, 2018).

The husITa Working Group (1988): Pictured left to right, top to bottom are Bryan Glastonbury (UK), Hein de Graaf (Netherlands), Walter LaMendola (USA), Stuart Toole (UK), and Dick Schoech (USA).
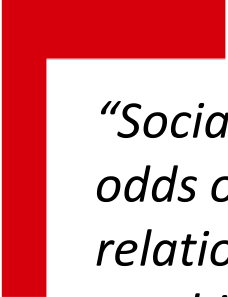
Striking similarities

"the guidelines discovered for using digital technology in the human services in 1978 were similar to guidelines now, and "human services... continue to struggle to use IT to support service delivery"

(Schoech, 2014).

Board Members Past and Present: (Back Row) Amanda Taylor, Jackie Rafferty, Dick Schoech, Hein de Graaf, Walter LaMendola, Jan Steyaert, Neil Ballantyne, Ann Lavan, Oluwagbemiga Oyinlola, Joe Ann Regan, Melanie Sage, Gloria Kirwan, (Front Row) Paul Fredollino and Jonathan Singer.

"Social work has historically been at odds or has had a 'turbulent' relationship with the role of machines, in what are intrinsically human services. The literature shows that negative perceptions of technologies in practice and an accompanying resistance, are a direct result of the misemployment of tools originally intended to complement and support the work"

(Taylor, 2019).

60% of social workers have work disrupted every week by case management system

A survey by Community Care also found three-quarters of social workers weren't consulted before a new case management system was introduced

by **Luke Stevenson** on June 7, 2019 in **Workforce**

Council to replace social workers' IT system first installed in 1995

Durham council is today replacing a 'not fit for purpose' database with a modern electronic case management system

on February 1, 2019 in **Children**

How a social work computer management system is made

The managing director of the biggest provider of social work computer management systems explains what goes into them

June 11, 2019 in **Social work leaders, Workforce**

Photo: fotolia/wax

by **David Grigsby, managing director of Liquidlogic**

Photo: PhotoSG/Fotolia

Social workers at a North East council may be celebrating today as their IT system is eased into retirement after almost a quarter of a century in use.

Council plans early replacement of 'problematic' social work IT system criticised by Ofsted

Timetable for procuring new case management software under discussion despite £2.5 million allocation for existing setup

by **Alex Turner** on June 10, 2019 in **Children**

(Image: Marcie Casas / Flickr)

A local authority rated 'inadequate' last year is planning to replace a social work IT system criticised by Ofsted, despite having three years left of an existing £2.5 million contract.

'I ended up using paper': 15 times social work IT systems got in the way

Community Care's survey highlighted some of the most frustrating experiences had by social workers when using their computer systems

June 7, 2019 in **Workforce**

Photo: Zorandim75/Fotolia

As part of **Community Care's 2019 IT system survey**, we asked social workers to describe their most frustrating experience with their case management or IT system.

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A Freedom of Information request sent by Community Care and answered by 124 councils for children's services and 120 for adults' found the breakdown of the most popular IT systems used by councils to be (with the company currently owning the system in brackets):

	Children's	Adults
LiquidLogic	44%	34%
Mosaic (Servelec)	24%	26%
CareFirst (OLM)	8%	14%
Frameworki (Servelec)	6%	6%
CareDirector	3%	3%
Swift (OLM)	3%	7%
Other	12%	10%

Despite the importance of case management systems in recording vital information about cases, and the impact of systems problems on the workforce, 73% said they were not consulted when the local authority implemented a new case management system.

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When professionalism does not translate to the online…

Social worker sacked for public Facebook posts calling children 'demonic' and mum 'moronic cow'

The social worker in North East Lincolnshire posted damning comments and sensitive case information online

Joanne Thomas has been sacked (Image: Grimsby Live)

A social worker gloated about having three children taken into care on her publicly accessible Facebook page.

Siobhan Condon, 41, bragged about the power she felt at breaking up the family and revelled in the judge giving the parents a 'massive rollicking'.

She even referred to the solicitor in the case complimenting her 'fine nails and shoes' before saying she was about to 'do the mammoth grim task' of removing the youngsters from their home and signing off with three kisses.

Social worker guilty of misconduct ov…

bbc.co.uk

'It was an amazing moment': Social worker gloats on Facebook over breaking up a family and revelling in the 'massive rollicking' the judge gave the parents

- Siobhan Condon bragged on social media about court proceedings
- Said judge had given parents a 'massive rollicking' over children
- Family court proceedings are normally shrouded in secrecy
- The 41-year-old gave enough detail to identify family in public Facebook post

Siobhan Condon bragged about the court proceedings on a Facebook page open to the public

Social workers using social media to find evidence on service users as lack of guidance leaves knowledge gaps

An FOI and survey finds a small number of council social media policies referencing guidance around surveillance, while a quarter of social workers say they have used a profile for evidence

November 28, 2018 in Workforce

Internet Monitoring

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child pornogra the web
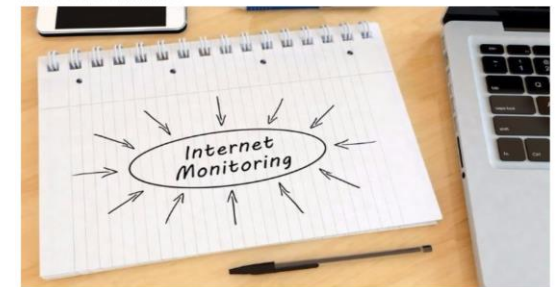
Cork Tusla employee claimed child porn images were part of research for work

A Tusla child and family agency employee who was caught with thousands of child pornography images claimed to gardaí that he downloaded them in an effort to figure out paedophiles and sex offenders as part of his work.

"A fantastic read and a marvel of economy... This is the kind of primer you want to slide under your boss's door."
—CORY DOCTOROW, BOING BOING

FROM GUTENBERG TO ZUCKERBERG

Disruptive Innovation in the Age of the Internet

JOHN NAUGHTON

bestselling author of *A Brief History of the Future*

We have "become critically dependant on a technology that is poorly understood"

(Naughton, 2012).

Few social workers feel training provides 'digital readiness' for practice, research finds

Practitioners tell SCIE and BASW study they want new workplace systems that prioritise relationship-based practice and augment rather than replace work carried out by humans

by **Alex Turner** on October 14, 2019 in **Workforce**

(Image: Marcie Casas / Flickr)

Only a small minority of social workers feel their initial training prepares them for using digital technologies in practice, a study has found.

Examining the contribution of social work education to the digital professionalism of students, in readiness to practice in the connected age

(Taylor, 2019)

Exploring the contribution of social work education to the digital socialisation of students for practice
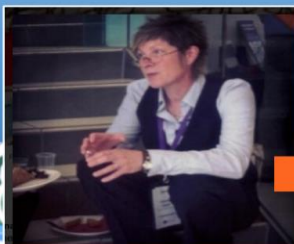
Amanda Taylor
University of Central Lancashire

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@amltaylor66

#DSSWEd

PROJECT OVERVIEW

The aim of this study is to explore the socialisation of students in social work education In England from a digital position; more specifically to investigate how they are equipped to navigate a practice landscape that is embroiled, shaped and influenced by the technological age (Cooner 2004).

The frequency of change in the professional requirements for social work education is, to some degree, driven by changes in the practice landscape. Consequently, professional socialisation of students requires regular review and revision to ensure that curriculum content equips them sufficiently for practice.

Throughout social work education and practice, technological requirements are at some level acknowledged; however much remains incidental and unrealised.

http://jswec.net/2015/sessions/amltaylor/

METHODOLOGY

Phenomenography educational research approach

SAMPLE
Final Year MA BA Social work students

RESEARCH AIMS

- Which technologies students have been exposed to
- How students use technologies whilst engaged with their professional training
- Establish if any prior digital exposure has had a bearing on engagement with technologies whilst in higher education
- Examine if or how students relate technological knowledge and abilities to their future practice
- Review how professional standards for social work education inform the curriculum in relation to practice in a digital world

INTERVIEW STRATEGY
(Mapping tool and unstructured interviews)

Reflective Mapping of Social Media / Technologies Tool

PROFESSIONAL

VISITOR — RESIDENT

PERSONAL
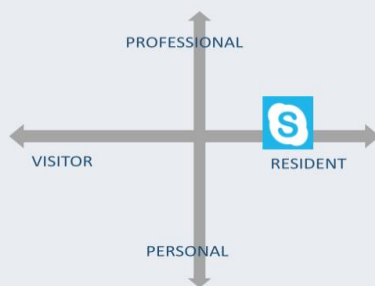
Visitors use technologies as and when required for a specific purpose, whereas resident usage is consistent and ongoing, for example Facebook or Twitter which are social networks that normally involve frequent engagement

Adapted from hhttp://daveowhite.com/vandr/ WHITE, D. S., & LE CORNU, A. Visitors and Residents: A new typology for online engagement. First Monday, [online]. Aug, 2011. Available at: http://firstmonday.org/ojs/index.php/fm/article/view3171/3049 . (Accessed 01 May, 2015).

WHY IS THIS RESEARCH IMPORTANT?

...to define digital socialisation as a layer of professionalism

Eliminate these kinds of headlines

'It was an amazing moment': Social worker gloats on Facebook over breaking up a family and revelling in the 'massive rollicking' the judge gave the parents

OUTCOMES

The outcomes of this work aim to inform the development of supplementary guidelines that could form an incremental framework for digital socialisation, a structure that would correspond with, and add to the current requirements as defined through the professional standards for social work education (QAA 2008; TCSW 2013; HCPC 2012).
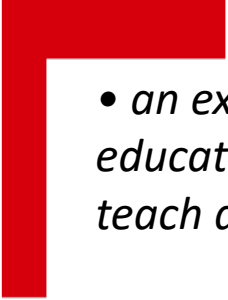
REFERENCES: Cooner, T.S. (2004) 'Preparing for ICT Enhanced Practice Learning Opportunities in 2010: A Speculative View.' Social Work Education. Vol.23 (6) pp. 731-744.   Health and Care Professions Council (HCPC) (2012) Standards of Proficiency: Social Workers in England. [online] Available at: http://www.hpc-uk.org/publications/standards/index.asp?id=569 (Accessed: 10 June 2015).   The College of Social Work (2013) Curriculum guides for qualifying social work education. [online] Available at: www.collegeofsocialwork.org/standard2colrhm.aspx?id=50&terms=Curriculum%20Guides (Accessed 20 May 2015).

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Experiencing Digital Development in Social Work Education

	Referential Aspects		
Structural Aspects	**Navigating the Digital**	**Examining the Digital**	**Reimagining the Digital**
Technical Orientation	**1.** expectations of the course		
Professional Orientation	**2.** being on the course	**2.** being on the course	
		3. observing others on the course	
Practice Orientation			**4.** applying learning to the course

DIGITAL EXPOSURE

Table 2: Outcome Space: a diagrammatical representation of the categories of ways of describing experiences of digital development.

• an exploration of how social work educators teach with the digital and teach about the digital

• a review of how practice education facilitates digital literacy development for students engaged in field placement

• an examination of the provision of digital literacy development for practitioners already practising in the field

More research is needed

Technological innovation is, and has been, fundamental to the development and sustainability of societies as a whole. Few of these shifts have taken place without problem or concern. Inevitably, therefore, social services will continue to have a role.

Why it is needed

THE FUTURE OF THE SOCIAL WORK [SOCIAL CARE] PROFESSION

"The future of the social work profession [and social care services more broadly] in the connected age, rests upon the development of digitally informed standards and requirements, delivered by digitally equipped educators to students who will become digitally minded practitioners - resulting in both practice appropriateness and therefore practice effectiveness"

(Taylor, 2019).

E-Government Development Index (EGDI) by Country

Low. Medium, High and Very High EGDI Groups

| 0 - 0.25 | 0.25 - 0.5 | 0.5 - 0.75 | 0.75 - 1 |
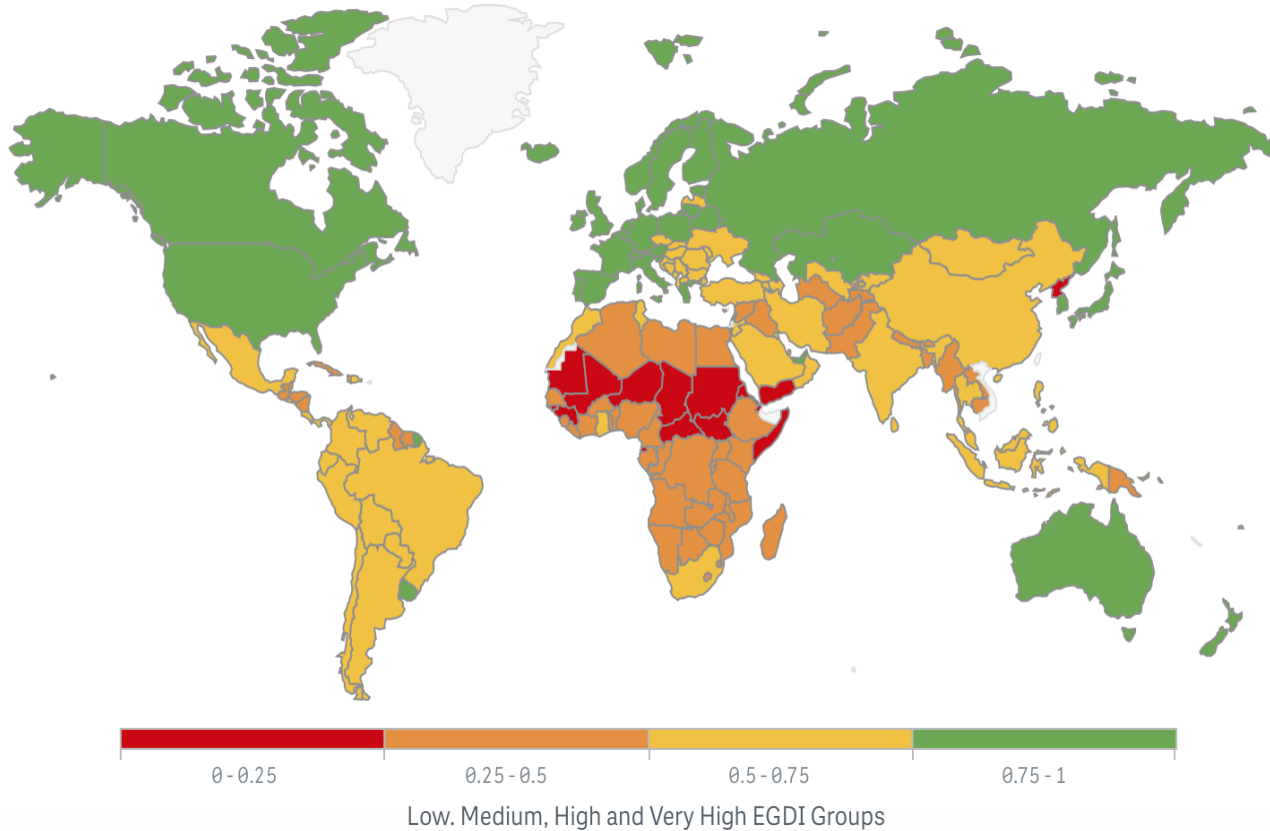
DIGITAL BY DEFAULT

E-GOV REPORT 2018

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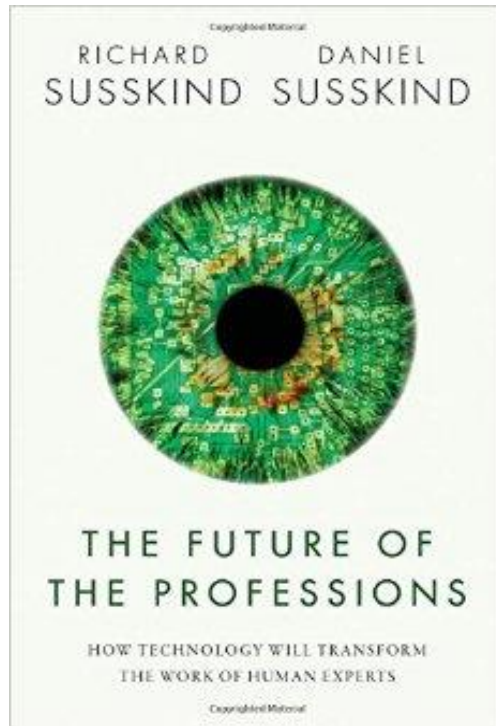
Reimagining the future of work

"Technology doesn't just optimise the traditional approach but actively displaces work we associate with the traditional professions"

(Susskind and Susskind, 2016)

EMERGENT TECHNOLOGIES

- *Socially assistive robots (SAR's)*
- *Cognitive assistant robots (CAR's)*
- *Physically assistive robots (PAR's)*
- *Artificial intelligence (AI)*
- *Machine learning (ML)*
- *Case management systems*
- *Big data*
- *Care coordination aids*
- *Smart sensors*
- *Smart phones*
- *Computer tablets*

ISSUES & TENSIONS

- *funding*
- *commissioning*
- *staff training and development*
- *ethics*
- *the culture of care*
- *move beyond prototype*
- *lack of research*
- *limited evidence base*
- *infrastructure*
- *accessibility*
- *safeguarding*
- *privacy and data implications*

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How do we bridge the knowledge, ethics and skills gaps that exist, whilst moving forward with this professional and cultural shift?

CONNECTION, COMMUNICATION & COLLABORATION

- *Identify significant stakeholders*

- *Create communities of learning for practice*

- *Nurture shared spaces to connect*

- *Communicate and debate ideas*

- *Develop resources, policy and multidisciplinary research tracks*
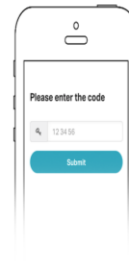
Go to **www.menti.com** and use the code 94 77 29

① Grab your phone
② Go to www.menti.com
③ Enter the code 57 62 41 and vote!

Collating ideas

https://www.mentimeter.com/s/a3c3e22e5eb7dbbc1782dfb6a7c805d8/c11580026540/edit

References

Ballantyne, N. (2017) *husITa celebrates its thirtieth anniversary*. [online]
https://www.husita.org/husita-celebrates-its-thirtieth-anniversary/

Schoech, D. (2014) Human services technology, 1980+: Retrospective and perspective. *Journal of Technology in Human Services*, *32*(4), pp.240-253.

Skills for Care (2018) Scoping study on the emerging use of Artificial Intelligence (AI) and robotics in social care . [online] https://www.skillsforcare.org.uk/Documents/Topics/Digital-working/Robotics-and-AI-in-social-care-Final-report.pdf

Susskind, R.E. & Susskind, D. (2015). *The Future of the Professions: How Technology Will Transform the Work of Human Experts.* Oxford: Open University Press.

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http://clok.uclan.ac.uk/29715/1/29715%20Taylor-Beswick%20Amanda%20Final%20e-Thesis%20%28Master%20Copy%29.pdf

Coffee Break

Practices from the local level:
Digital case management systems

Digital Transformation : A Social Work Innovation Story

Declan McAllister
October 2019

Northern Ireland
Social
Care
Council
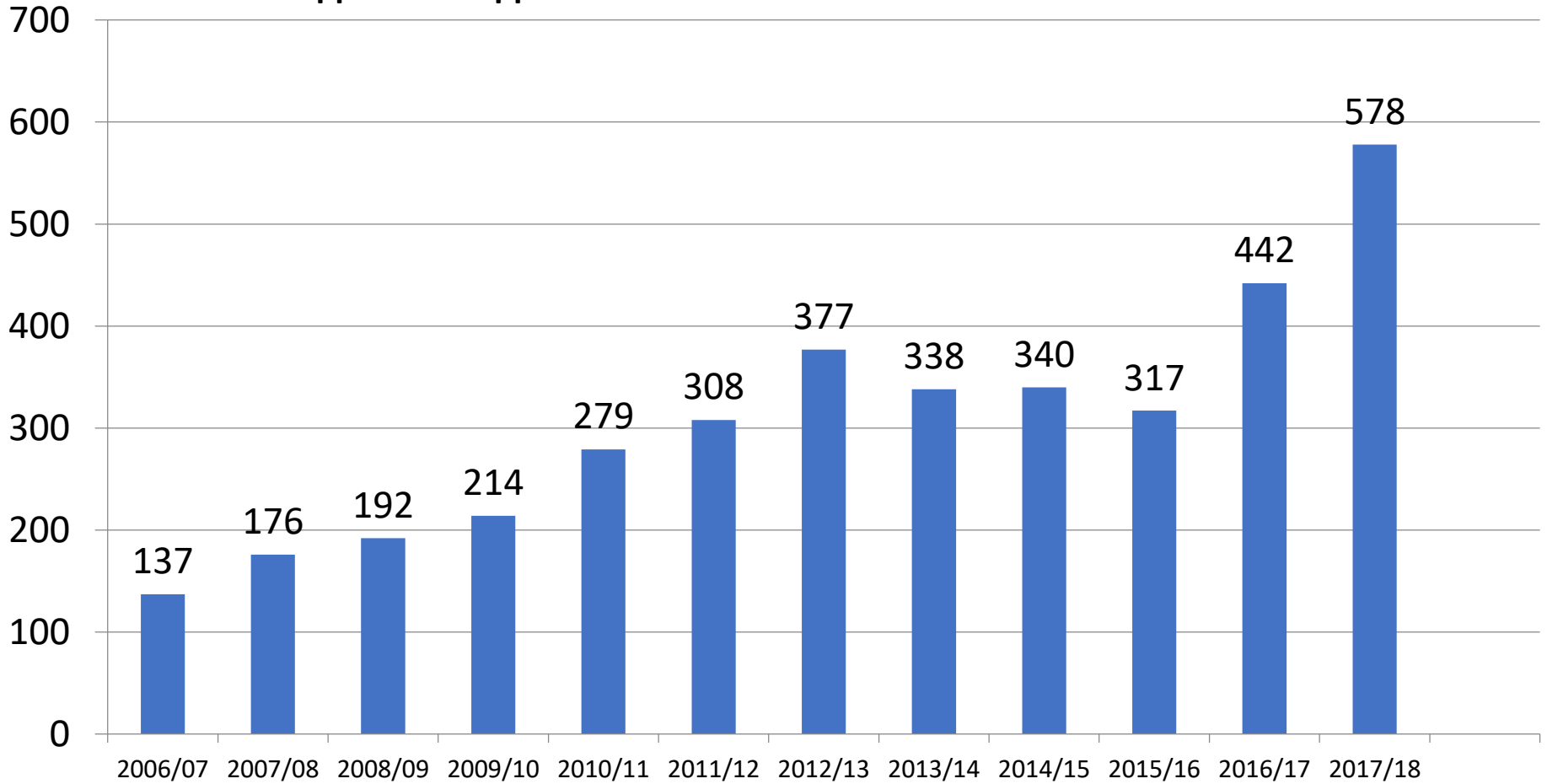
Together we are raising the standards of care

The Northern Ireland Social Care Council are the regulatory body for all of Northern Ireland's social workers, social care workers and social work students.
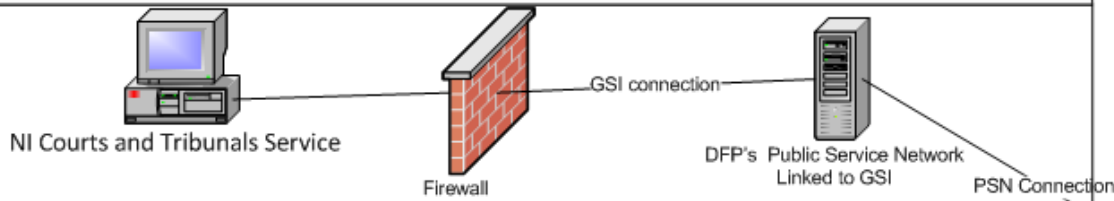
The Driving Force

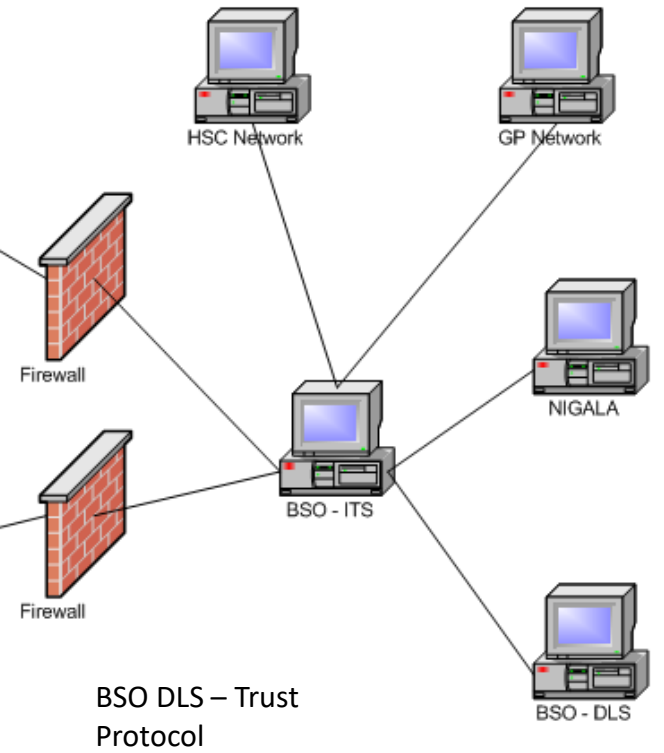
Care Application Appointment Numbers 2006 to 31st March 2018

Year	Care Appointments
2006/07	137
2007/08	176
2008/09	192
2009/10	214
2010/11	279
2011/12	308
2012/13	377
2013/14	338
2014/15	340
2015/16	317
2016/17	442
2017/18	578

The Obstacles

"I entered Social Work to build relationships with people, not with computers"

Northern Ireland
Social
Care
Council

Capital and Revenue Investment in GCIS
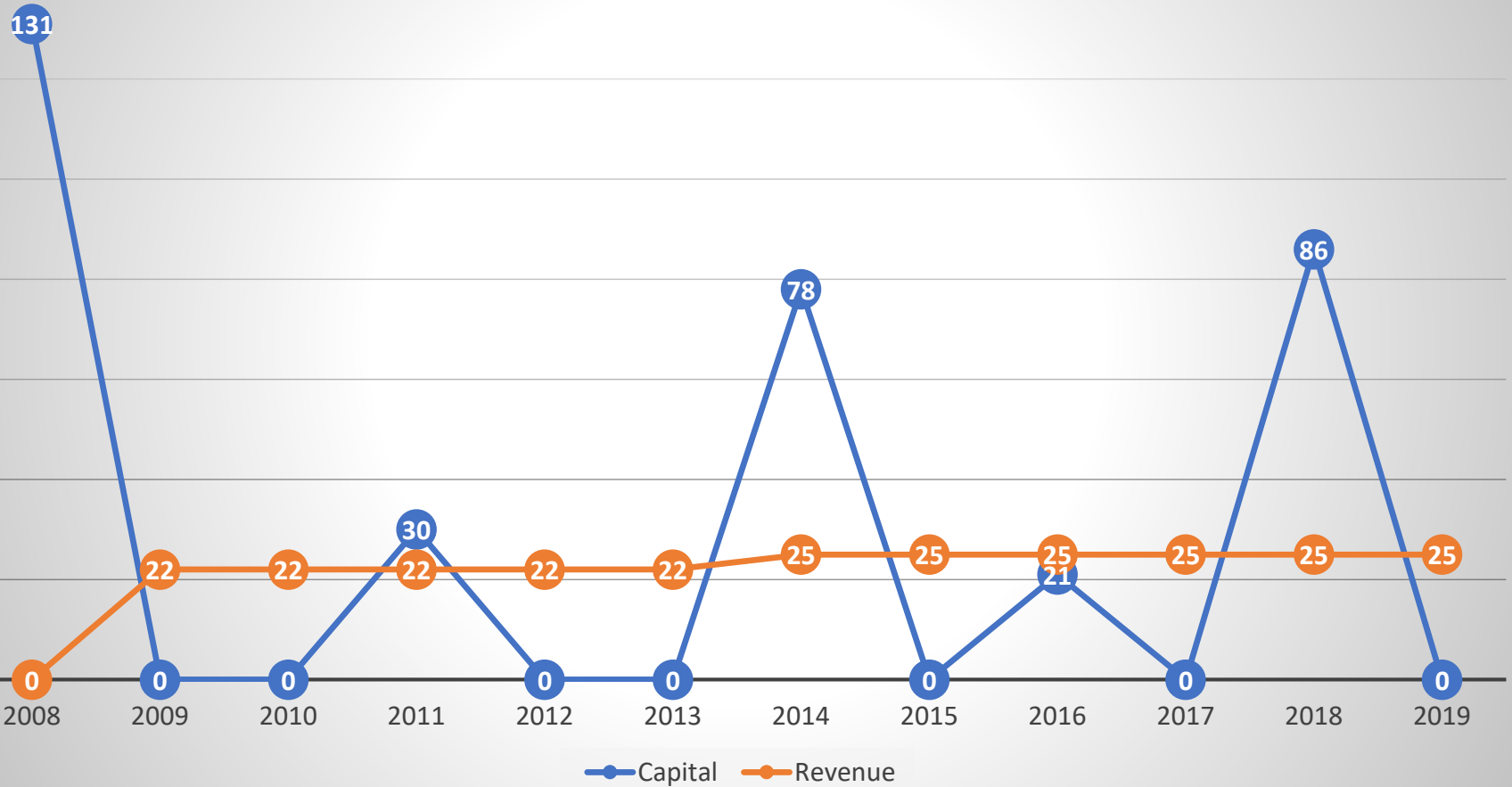
Guardian Case Information System (GCIS)

- Access Controls based on need of access
- Accessible via VPN
- Integrated with Digital Pen and Outlook Calendar
- Retention of Case Records for 75 years
- PD0008 Compliant

"If we were still on a paper system we would be drowning in the admin side of the professional work"

The ongoing shift towards digital recording and the scanning of non-digital records may exacerbate the loss of those electronic records and photographs and further fragment a care-leaver's lived experiences (Munro, 2011).

So lets hear from a Professional Guardian ad Litem

Evaluation

Follow us :

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Declan.mcallister@niscc.hscni.net

#ProudtoMakeaDifference

Questions?

Northern Ireland Social Care Council

7th Floor, Millennium House
25 Great Victoria Street
Belfast, BT2 7AQ

Website : niscc.info

Telephone : 028 95 362 600

**Working together.
Making a difference.**

Northern Ireland
Social
Care
Council

Practices from the local level: Digital case management systems

'Cartella Sociale Informatizzata'

Daniele Crespi, Digital Innovation Manager, ARIA S.p.A., Italy

CSI – Cartella Sociale Informatizzata (Electronic Social Record)

ESN - Digitalisation Working Group

ARIA
AZIENDA REGIONALE PER
L'INNOVAZIONE E GLI ACQUISTI

Berlin, 17-18 October

Regione Lombardia

Social and Health Care Network in Lombardy Region is very heterogeneous

The Social and Health Care Network presents a multitude of different actors

1,507 Municipalities

10 Million Inhabitants

A territory of *23,863* sq. Km

95 Social Care Local Authorities
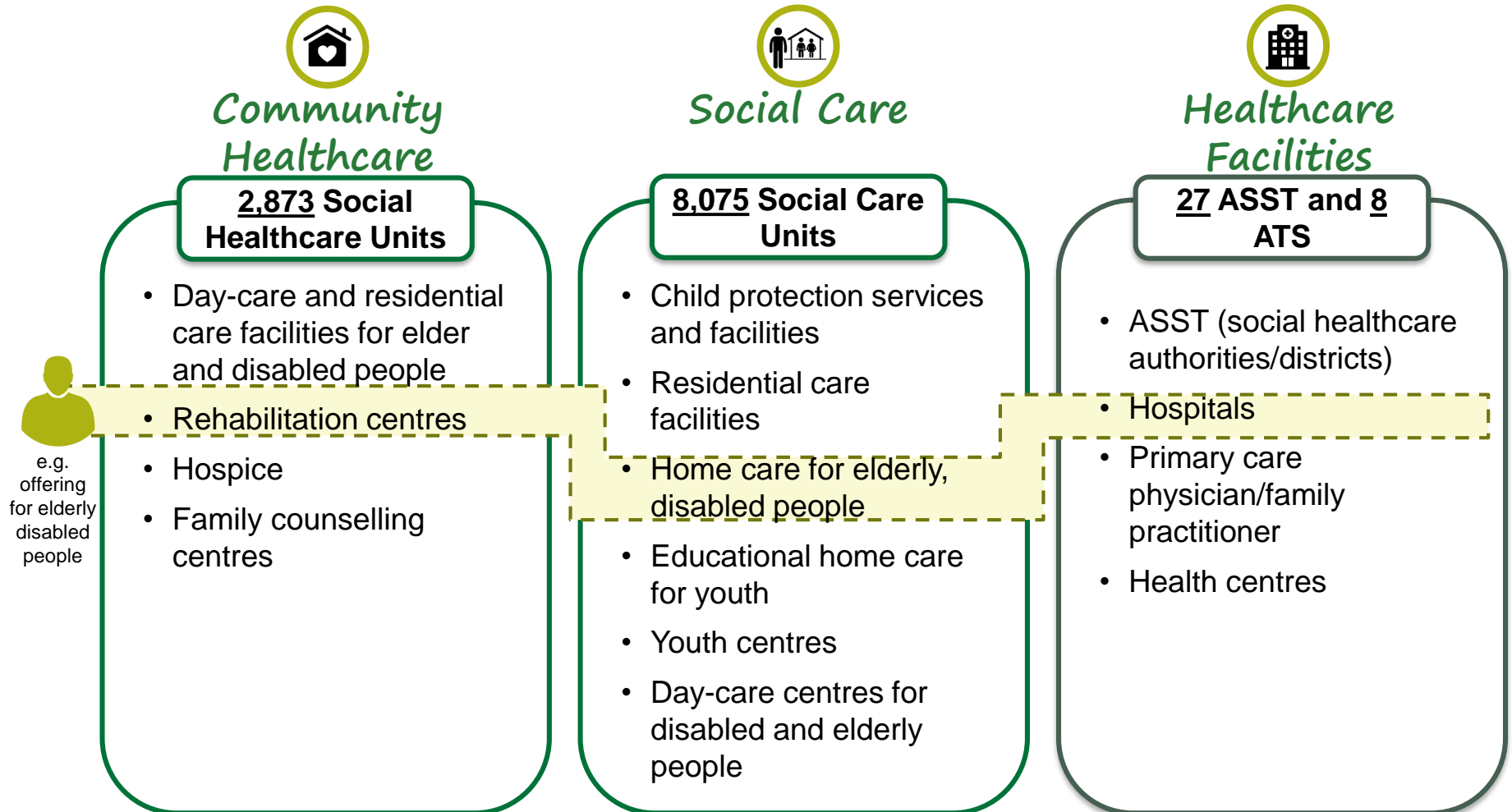
8 Social Healthcare Agencies (ATS)

27 Social Healthcare Authorities/Districts (ASST)

..and thousands of Non-profit organization..

Service offering is varied, and departments' boundaries are often overlapping

The services offered by the Social and Health Care providers are often transversal and they miss opportunities to provide an integrated service

Community Healthcare

2,873 Social Healthcare Units

- Day-care and residential care facilities for elder and disabled people
- Rehabilitation centres
- Hospice
- Family counselling centres

e.g. offering for elderly disabled people

Social Care

8,075 Social Care Units

- Child protection services and facilities
- Residential care facilities
- Home care for elderly, disabled people
- Educational home care for youth
- Youth centres
- Day-care centres for disabled and elderly people

Healthcare Facilities

27 ASST and 8 ATS

- ASST (social healthcare authorities/districts)
- Hospitals
- Primary care physician/family practitioner
- Health centres

The possibility to achieve a homogeneous offering of social services is hindered by different factors

There is the need to develop the Social Network, the digitalisation and homogenisation of its processes and services, establishing interoperability rules through an integrated tool

Institutional fragmentation	**Facilitate institutional recomposition**
Different mandate of operators	**Define phases and operator responsible for each one**
Differentiation in services provided	**Coordinate Social and Health Care offer present in the territory**
Isolation from other Institution	**Permit to overcome burdens between different entities**

Electronic Social Record enables Lombardy Region to overcome the fragmentation and integrate different sources of information

In order to support the entities of the Social Network in achieving an integrated Social System, Lombardy Region has recognised the necessity to recompose different sources of information

Knowledge tools for the local welfare network

Needed to **supervise** and **evaluate outcome** of local welfare system ex: social outcome, register of social care facilities and services

Financial Reporting tools of regional and national resources

Needed to **programme**, **control** and **monitor** regional and national welfare **expenditure**, knowing the services delivered at the individual level

Electronic Social Record ("Cartella Sociale Informatizzata" - CSI)

Needed to manage responses on citizen's social needs and to program local welfare system
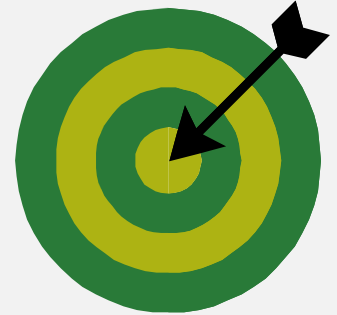
Guidelines for Electronic Social Record (CSI) have been proposed by Lombardy Region to facilitate spread of the tool

The guidelines should help different entities in the homogenising process of the Social Network. The guidelines have at least a threefold aim

1   **Support local authorities in developing Electronic Social Records (CSI)**

2   **Allow the planning and governance of social services**

3   **Allow to fulfill information discharge obligation with regional and national authorities**

In 2016 we started the Electronic Social Record journey with an AS-IS analysis on the degree of digitalization in social services

We firstly assessed the "as is" situation regarding the level of organisation and digitalisation of local entities in the social field

67% The prevailing social service management mode was **associate management** through special consortium companies

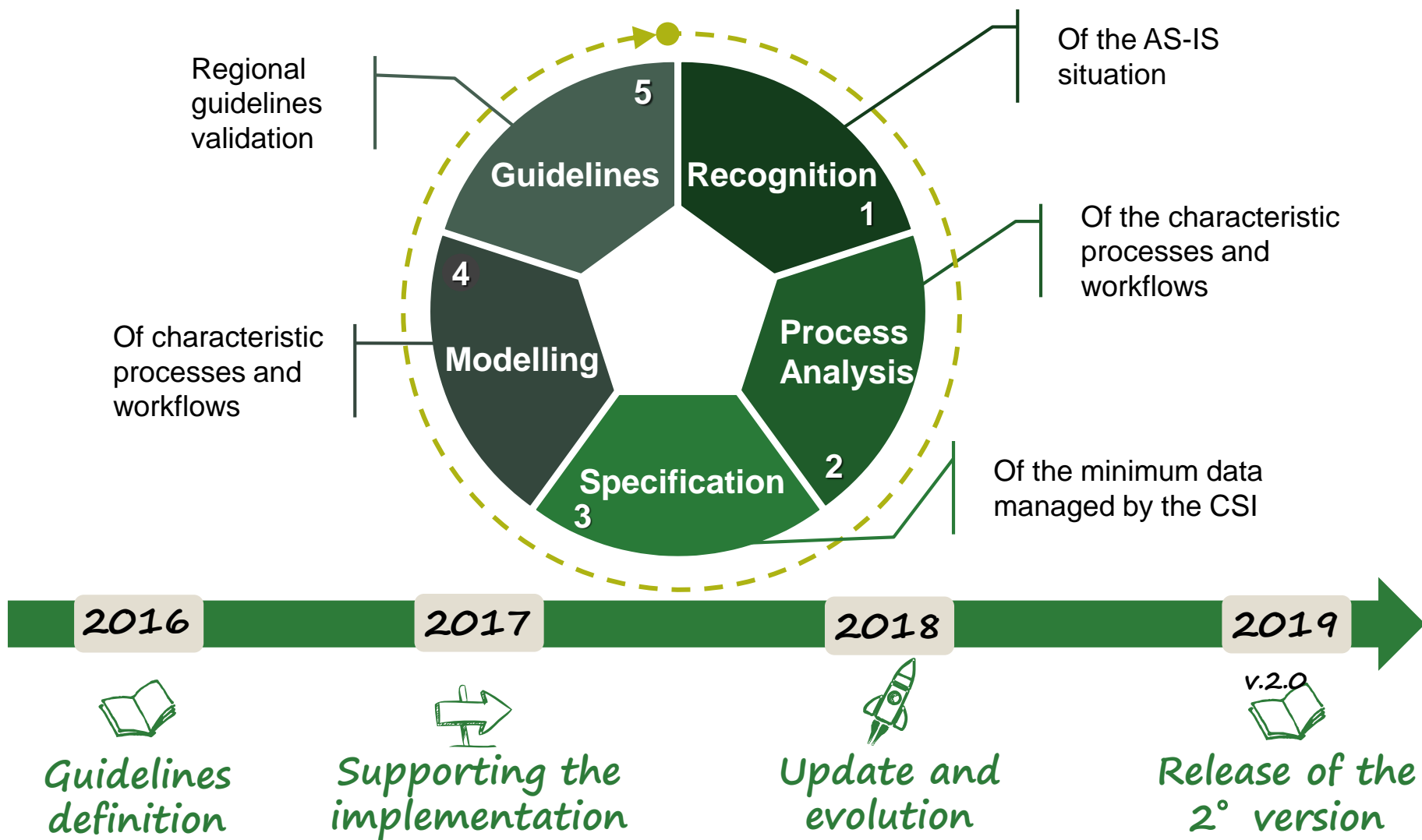**50%** Almost half of the respondent local entities **presented information systems** since 3 years

36% Almost 1/3 of local entities had made **tenders for** the furniture of **Electronic Social Records**

50% The majority of respondents **used digital instruments** for the data record compliant with the functionalities described in the guidelines

The Electronic Social Record (CSI) journey started in 2016 has proceeded in an optic of continuous improvement

Regional guidelines validation

Of the AS-IS situation

Of the characteristic processes and workflows

Of characteristic processes and workflows

Of the minimum data managed by the CSI

5 Guidelines
1 Recognition
4 Modelling
Process Analysis
3 Specification
2

2016 — Guidelines definition

2017 — Supporting the implementation

2018 — Update and evolution

2019 — v.2.0 — Release of the 2° version

The definition of the regional guidelines involved many different actors
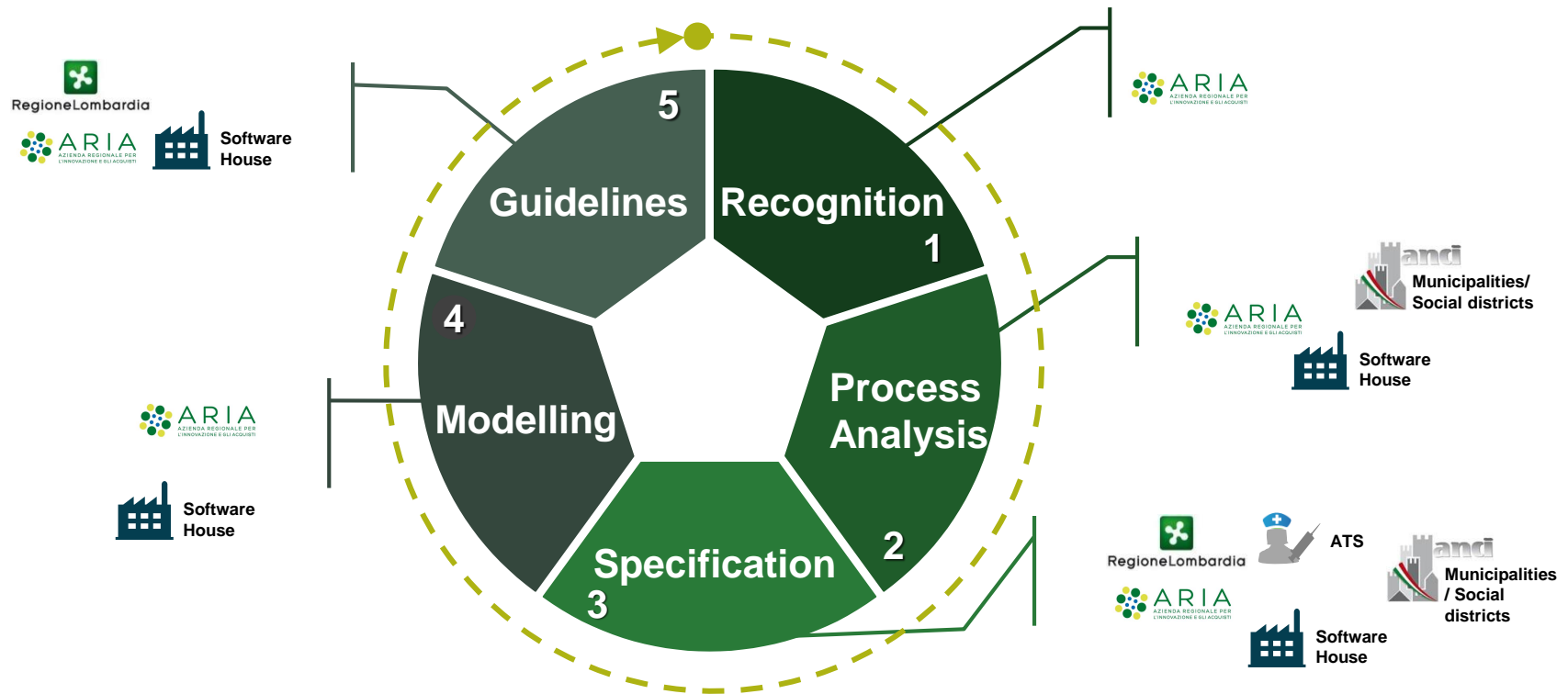
We organised workshops periodically with different actors involved in the definition of the regional guidelines in order to keep the guidelines updated

Joint work of the different actors was collected and systematised into the regional guidelines

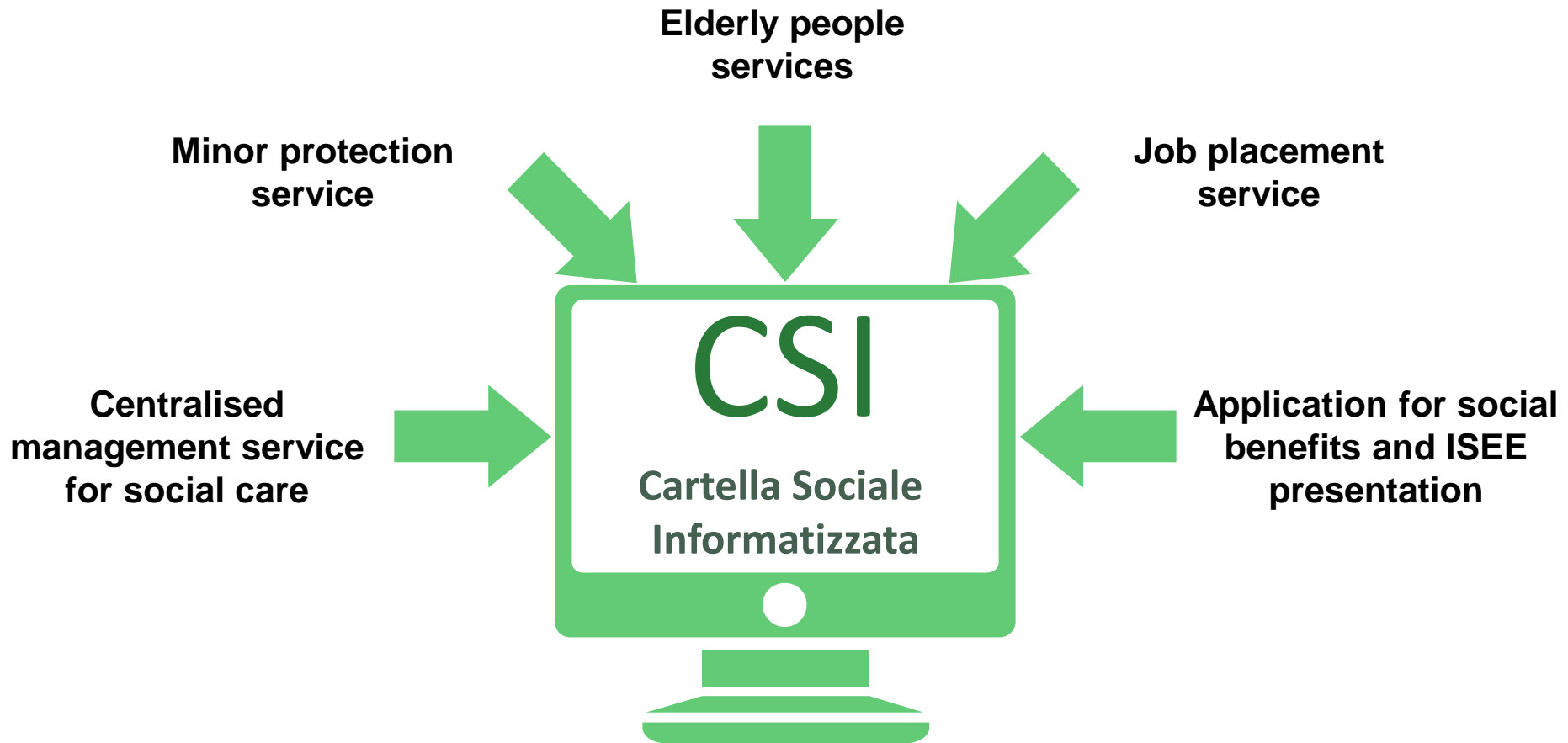The work done with all the different involved actors resulted in guidelines containing all the indications for the development of the Electronic Social Record and even some working tools

Contents & Working tools

- Characteristic workflows
- Set of managed data
- Reference information model
- Minimal features
- Interoperability requirements
- Non functional requirements
- Evolutionary features
- Handbook indicators
- Attachments
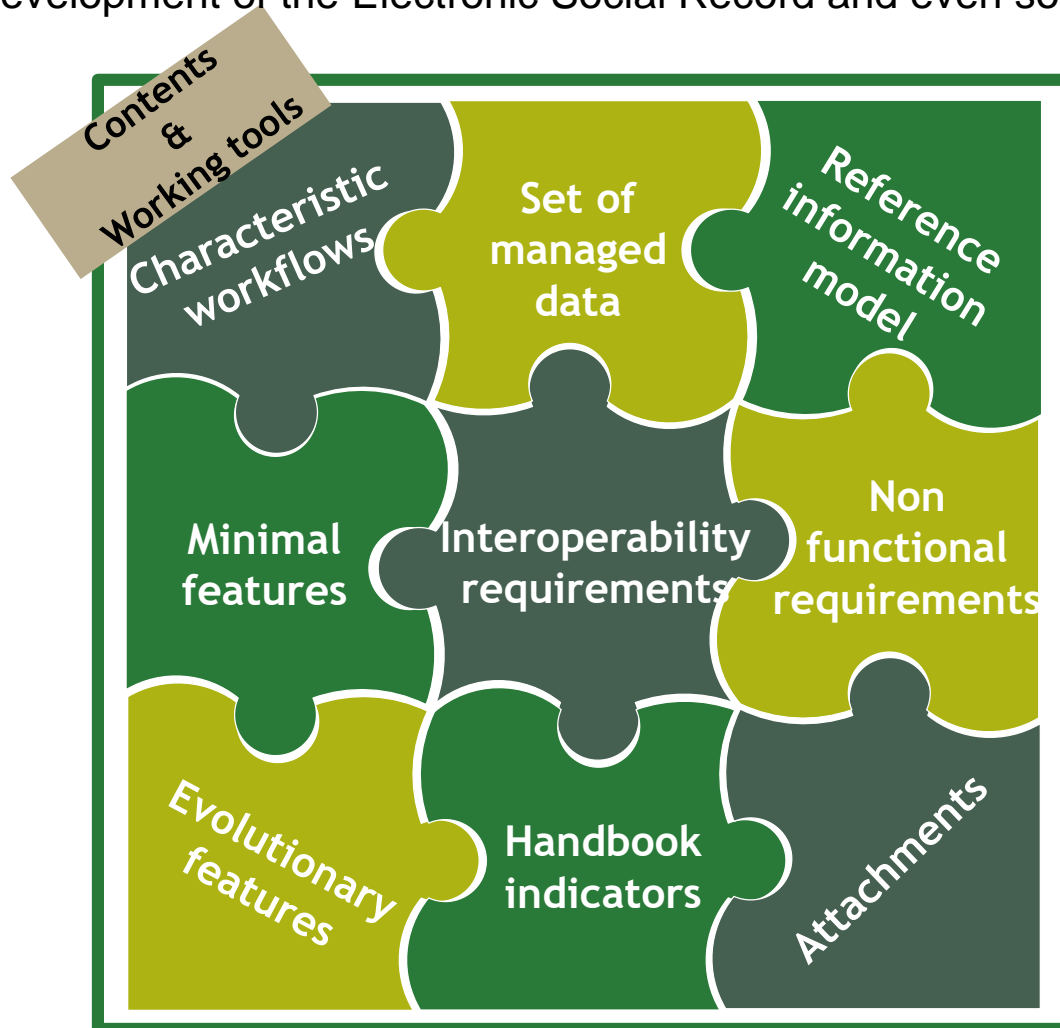
The Electronic Social Record's Ecosystem is various and heterogeneous

The Electronic Social Record has many different stakeholders since it allows to integrate providers and programmers of health and social care services
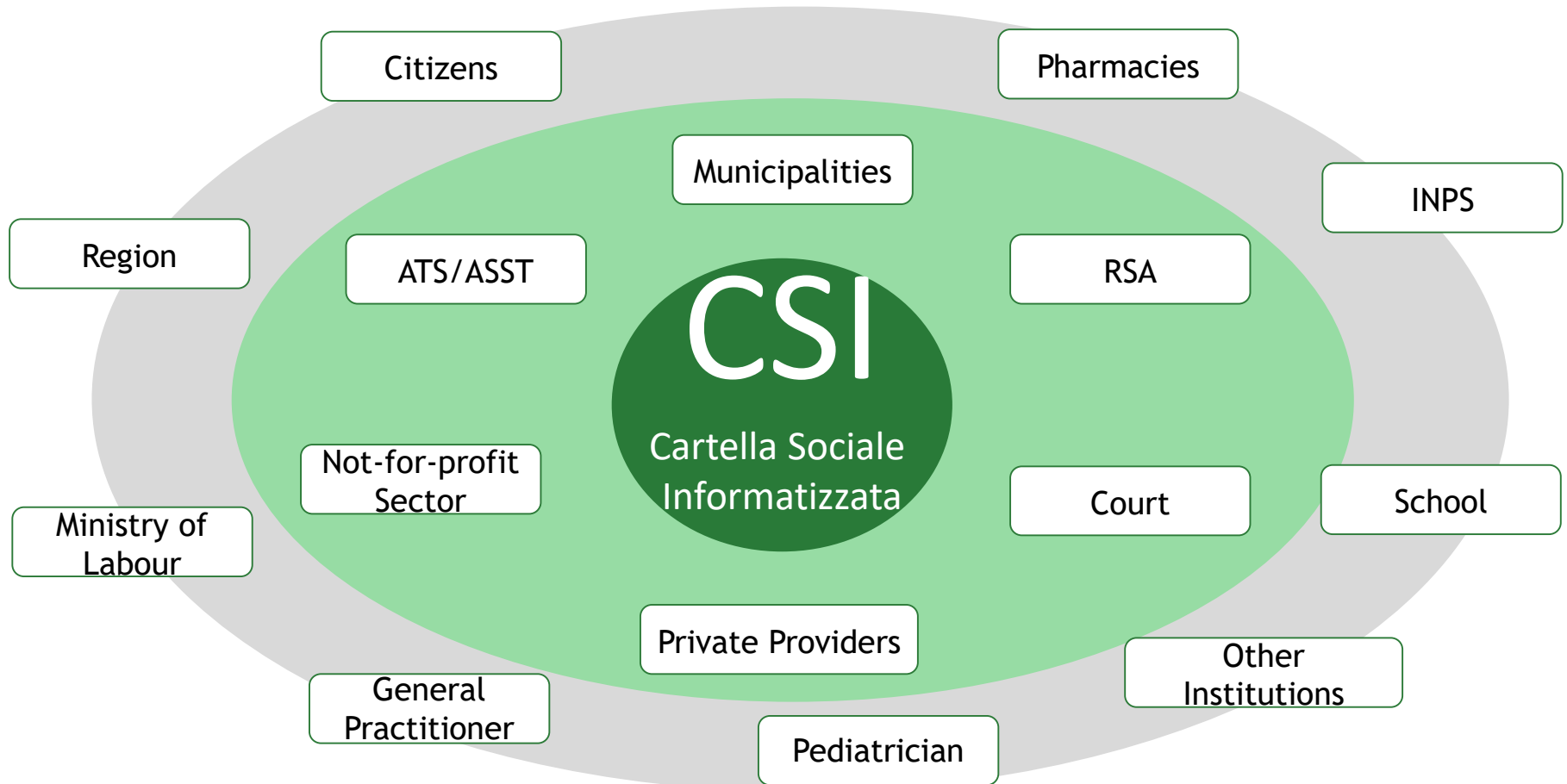
The Electronic Social Record allows to integrate various services and departments

In the Electronic Social Record many services and departments are integrated, however application forms and IT services management procedures can be implemented dynamically

Elderly people services

Minor protection service

Job placement service

Centralised management service for social care

CSI
Cartella Sociale Informatizzata

Application for social benefits and ISEE presentation

The first results of project outcomes are promising and encourage the region to invest in the project

In 2017 Lombardy Region has publicly financed the diffusion of Electronic Social Record compliant with the regional guidelines

40 Social Care Local Authority start the realisation of new CSI according to regional guidelines

45 Social Care Local Authority implement the existing CSI according to regional guidelines

1 Social Care Local Authorities start the integration of CSI with other regional or national authority's information systems

Out of 98 territorial areas, 93 submitted an application for public funds and 86 received them

The benefits of the initiative are various and tackle different actors of the social service world

The adoption of an Electronic Social Record compliant with the regional guidelines permits the:

Uniform and efficient management of the Social Services

Production and transmission of data between different institutions in order to have a clear vision of the recipients clinical and social history

Fulfillment of information discharge obligation with regional and national authorities

8
Development of a tool compliant with the regional guidelines by 8 Electronic Social record providers

Survey conducted in September 2019

73%
Of the Social Records are digitalised and compliant with the regional guidelines (78% respondent Social Care Local Authorities)

1/4
Of the respondents declare that their social record is completely digitalised (78% respondent Social Care Local Authorities)

89%
Of professionals use the tool daily (99% respondent Social Care Local Authorities)

In order to evaluate the impacts of the project, we need to evaluate sustained costs

The costs that we should consider are those of Lombardy Region associated with the creation of the guidelines and the costs from the municipalities that have implemented a tool compliant with the guidelines

Lombardy Region

The costs for the experts involved in the working tables are negligible ＋ **There are no implementation costs since the implementation phase wasn't carried out** ＝ **From a monetary point of view costs are: NOT RELEVANT**

Municipalities

Implementation Costs (lump sum) 20 K ＋ **Maintenance Costs (per year) 0.2 cent/inhab** ＝ **From a monetary point of view costs are relevant but it is worth the effort**

We are now working on new updates to the guidelines and to facilitate their diffusion

In line with the continuous improvement methodology adopted from the set-up of the project, since the last publication we have been working on a series of updates to facilitate the use of the instrument

Publication of updated guidelines

Privacy Consent form

Social monetary benefit management (RdC)

Support to local entities

Professionals' training on indicators use

Use indicators summary

Coding and processes definition

Webinar

Feasibility study

Worktable on recipients' registries (ANPR)

Exchange Hub

Indicators on Costumer Satisfaction

CSI – Guideline V2

Indicators Manual V1

Thank you

Practices from the local level:
Digital case management systems

PRIA – Social and Healthcare Integrated Solution

João Vairinhos, Project Coordinator, Santa Casa da Misericórdia
de Lisboa, Portugal

Santa Casa da Misericórdia de Lisboa
Departamento de Ação Social e Saúde

SANTA CASA DA MISERICÓRDIA DE LISBOA

- Non-profit Portuguese Catholic secular organisation;

- Right to maintain and operate lotteries and betting throughout Portuguese territory;

- Operates under the State's Social Security Tutelage;

- Distributes earnings to social causes (operates social and health services in Lisbon's District);

- Other intervention areas (real estate; culture, education and innovation).

SOCIAL SERVICES DEPARTMENT

- Children and young people

- Families;

- Elderly people;

- People with disabilities;

- People with extreme vulnerabilities (homeless people, domestic violence, etc.);

- Adoption;

- Volunteering.

Why?

SOCIAL SERVICES APPLICATIONS
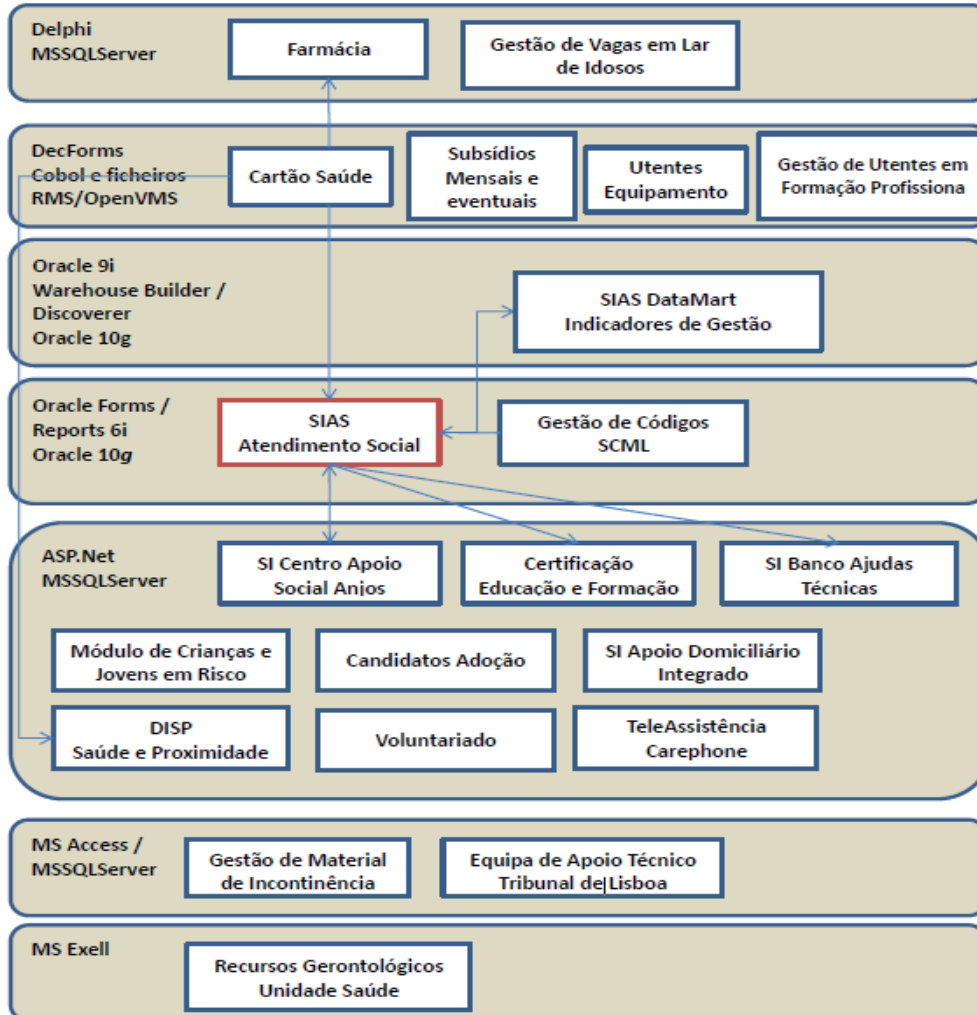
- **Functional gaps and low system integration**

- **Obsolete technology with high maintenance costs (ex: Cobol)**

- **Service users data dispersed on several platforms**

- **Lack of management support data**

- **Lack of information security mechanisms**

- **Lack of content segmentation based on professional roles**

WHY?

- To reduce/eliminate unnecessary bureaucratic procedures and duplication of data collection and storage (digital or physical);

- To increase SCML's professionals access speed to service users data: **360º degree vision** of the service users and their interactions with the organization;

- To improve professional practices through greater accountability and transparency (procedure manuals and regulations compliance);

- To improve data communication with other organisations in order to facilitate service users access to economic and non economic benefits.

WHY?

PROCESS OPTIMIZATION:

We want to do better.

How?

HOW?

- International procurement;
- Functional analysis;
- Change management;
- Product development and testing;
- Data migration;
- Go-live and deactivation of the older solutions;
- Corrective and evolutive maintenance (two years) and new features development (ongoing).

HOW?

- **Creating a digital custom made case-management solution, adapted to SCML's context, in order to fulfil service user's needs**

Key-Factors

Project Management

PROJECT MANAGEMENT
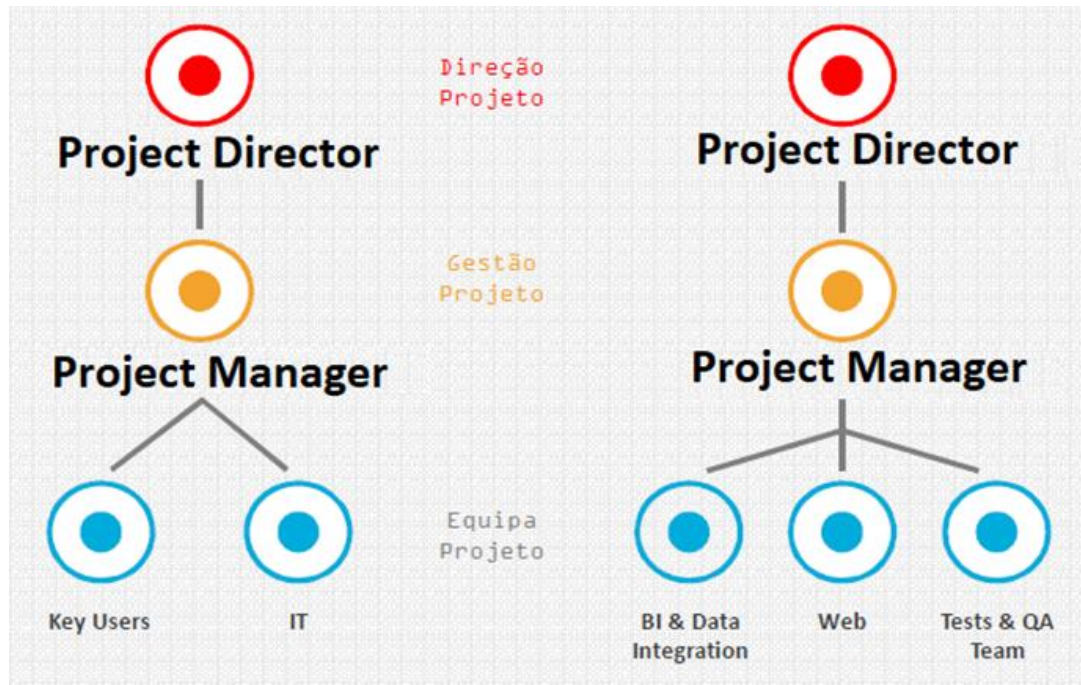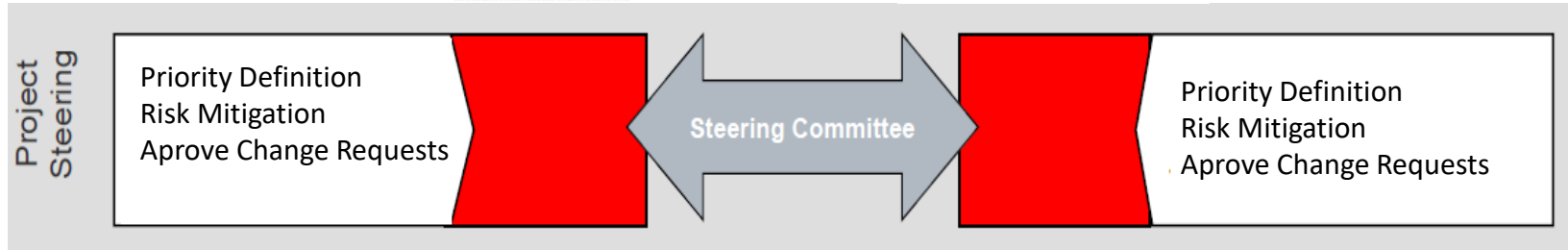
Key-Factors

Functional analysis and key-user engagement

FUNCIONAL ANALISYS PROCESS MAPPING

- Thorough **functional diagnosis report** of the various systems used by SCML's social services;

- **Design thinking sessions meetings**, involving over 40 key-users from the various departments;

- **Process mapping and re-engineering meetings** with key-users;

- **Functional requisites documentation.**

Key-Factors

Change Management

- **Expectations:**

- "Different profiles to access data"
- "Paper reduction in process workflows
- "More user friendly solution"

▪ **Doubts:**

- ▪ "Will we make it this time?"
- ▪ "Is data migration a possibility. We don't want to register information again. Will it be accurate?"
- ▪ "How will we balance the quantity of data?"

▪ **Opportunities:**

- ▪ "Possibility to work with other institutions"
- ▪ "Simpler and intuitive solution"
- ▪ "Faster access to relevant data"

▪ **Fears:**

- ▪ "Slow bandwidth and desktops. Will we be able to work with the new solution?"
- ▪ "Will the users be trained"
- ▪ "If the system blocks, what can we do?"

TRAINING*

137
Sessions

766
Professionals

793
Hours

1.289
Participants

* Before go-live

Key-Factors

Data Migration

DATA MIGRATION

+300,000 service users
+200,000 family case files
+250,000 duplicated services users
+130,000 social diagnosis
+100,000 intervention plans
+130,000 economic benefits
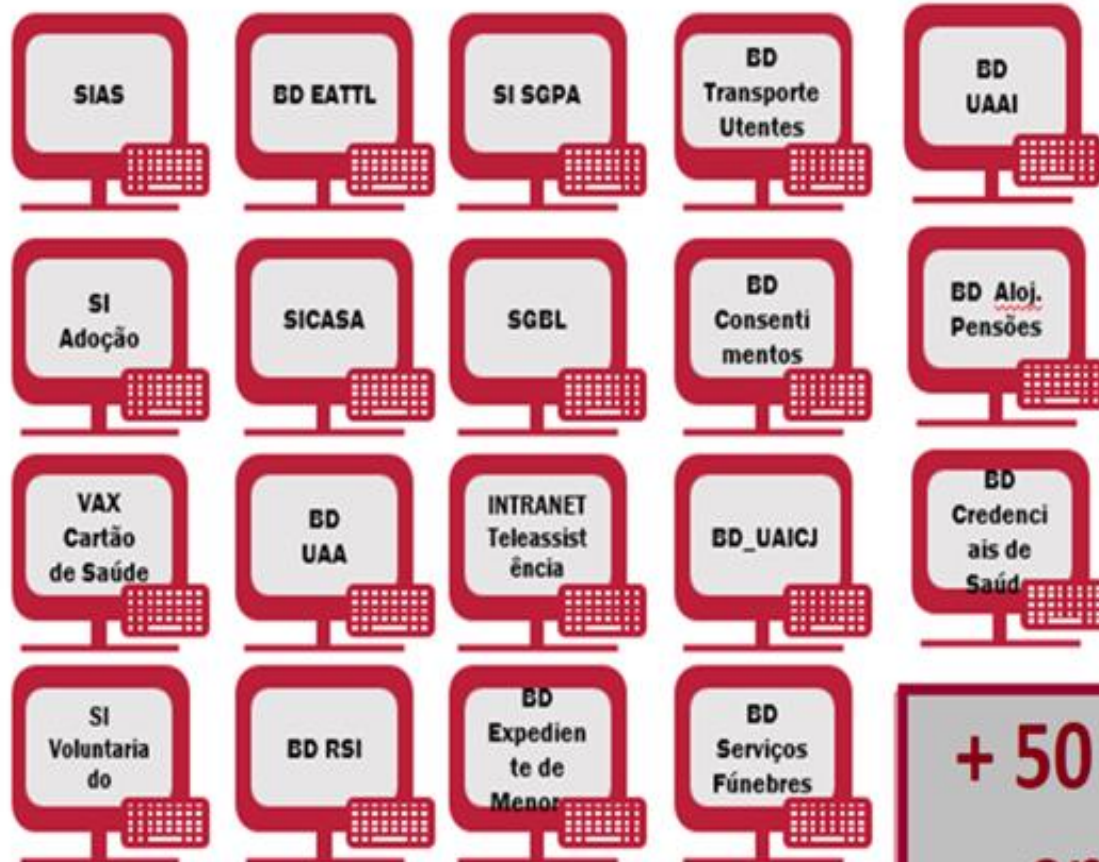
35 original sources

+ 50 million entries

PRIA

- Project start: 19/01/2015

- Project duration: 3 Years

2 Months	9 Months	1 Month	24 Months
Functional requisites documentation	Product development and data migration. Tests	Acceptance Tests	Corrective and Evolutive Maintenance
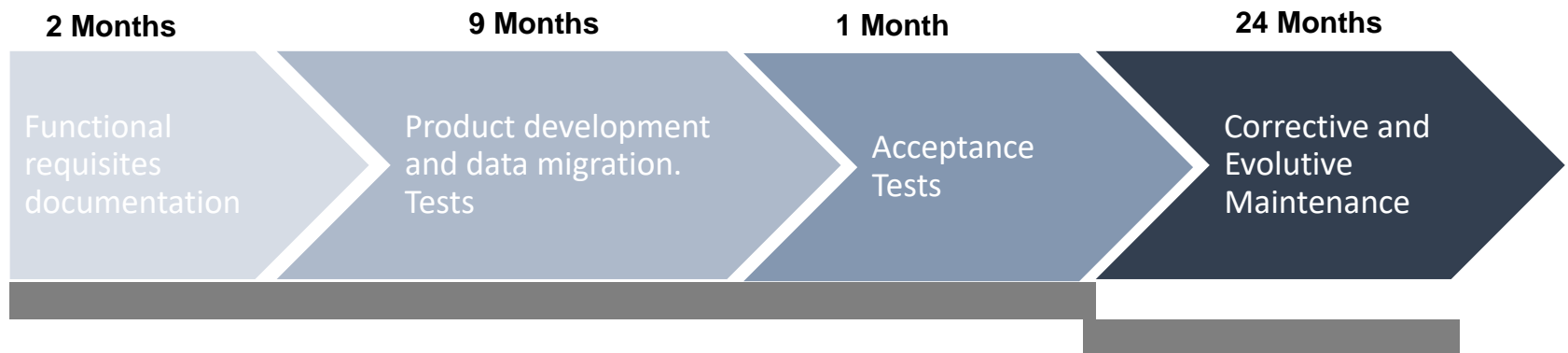
- Project cost: €2,525,000.00 + Bandwidth desktop upgrades

SCML – ESN – 17/10/2019
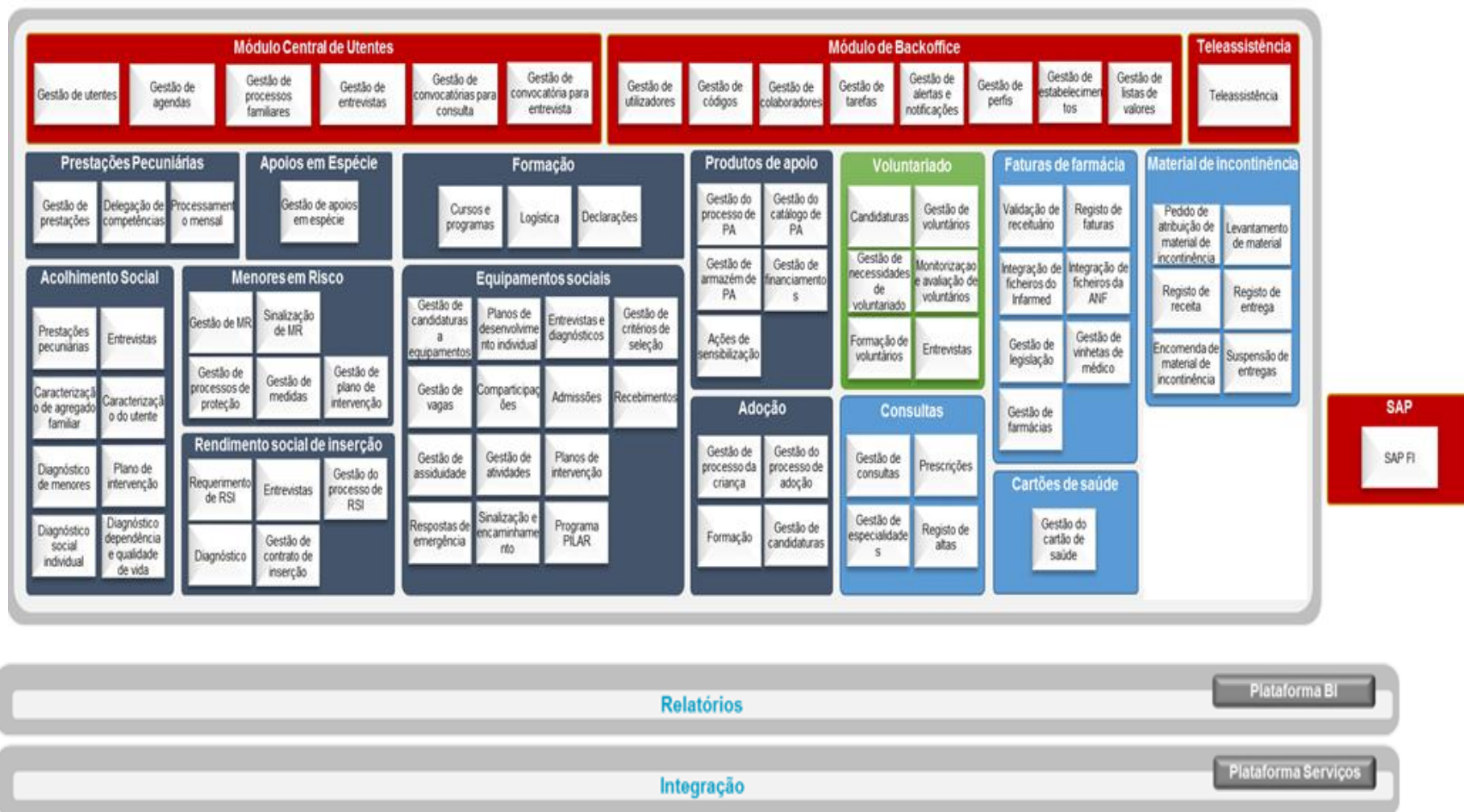
DATA ENTRIES

100,826
Family
case-files

124,496
Intervention
Plans

394,707
Economic
Benefits

123,632
Health
Cards/Credentials

104,125
Non-Economic
Benefits

87,584
Social responses
users

344,189
Invoices

1,703,462
Interviews and
other activities

DATA ENTRIES

311,868

Service users registered

61,765 active users

BUSINESS INTELLIGENCE

INTEGRATION WITH OTHER PLATFORMS

- www.scml.pt;

- SAP (financial transactions using PRIA's Front-End);

- Post-Offices and Banks (economic benefits to users);

- Pharmacies (Health Card).

INTEGRATION WITH OTHER PLATFORMS

Importação de Candidatos a Voluntariado ⌄

Estado

| Registado ▼ |

Limpar   ⤓ Exportar   🔍 Pesquisar

Lista de Candidatos

Nome ↓↑	Data de Registo ↓↑	Estado ↓↑	
Nome 1	11/10/2019	Registado	▶
Nome 2	11/10/2019	Registado	▶

Nº de resultados

| 10 ▼ |

2 registos listados.

« **1** »

PROCESS OPTIMIZATION EXAMPLE HEALTH CARD

INTEGRATION WITH OTHER PLATFORMS

SERVICE USERS 360º VISION

Jose ████████████████
☐ ████████████

Visão Temporal

Hoje

Legenda
🕸 Consulta 🔍 Diligência ⭕ Entrevista ✳ Ocorrência RSI RSI 🔶 Visita domiciliária 🏠 Voluntariado

Processo Familiar

🏢 **Fase do Processo** Intervenção Ativa

👥 **N.º de Elementos** 2

🔗 **Tipologia do Agregado** Casal sem Filhos

👤 **Gestor** Sandra Machado

Avaliação Diagnóstica

📋 **N.º de diagnósticos em curso** 0

📅 **Data do último diagnóstico** 24/11/2011

👤 **Responsável do último diagnóstico** Migração

Plano de Intervenção

📋 **N.º de planos de intervenção em curso** 0

📅 **Data do último PI** -

📅 **Data de avaliação do último PI** -

👤 **Responsável do último PI** -

Estabelecimentos

Prestações

💰 **Prestações Mensais** 0,00€

💰 **Prestações Eventuais** 0

💰 **RSI** -

🎁 **Apoios em Espécie** -

Cartão / Credencial

💳 **Cartão de Saúde** 2º Escalão c/ med - 09/04/2020

📄 **Credencial** -

NEXT STEPS

NEXT STEPS

- General data protection regulation compliance;

- Data quality;

- Integration with other internal and external platforms;

- Increase of service users interaction.

Santa Casa da Misericórdia de Lisboa
Departamento de Ação Social e Saúde

Discussion: Expected outcomes

- What end product would you like to see from the working group? What would be most useful?
  - Policy briefs summarising each meeting
  - E-Guide best practice collection
  - Other suggestions
- Questions?
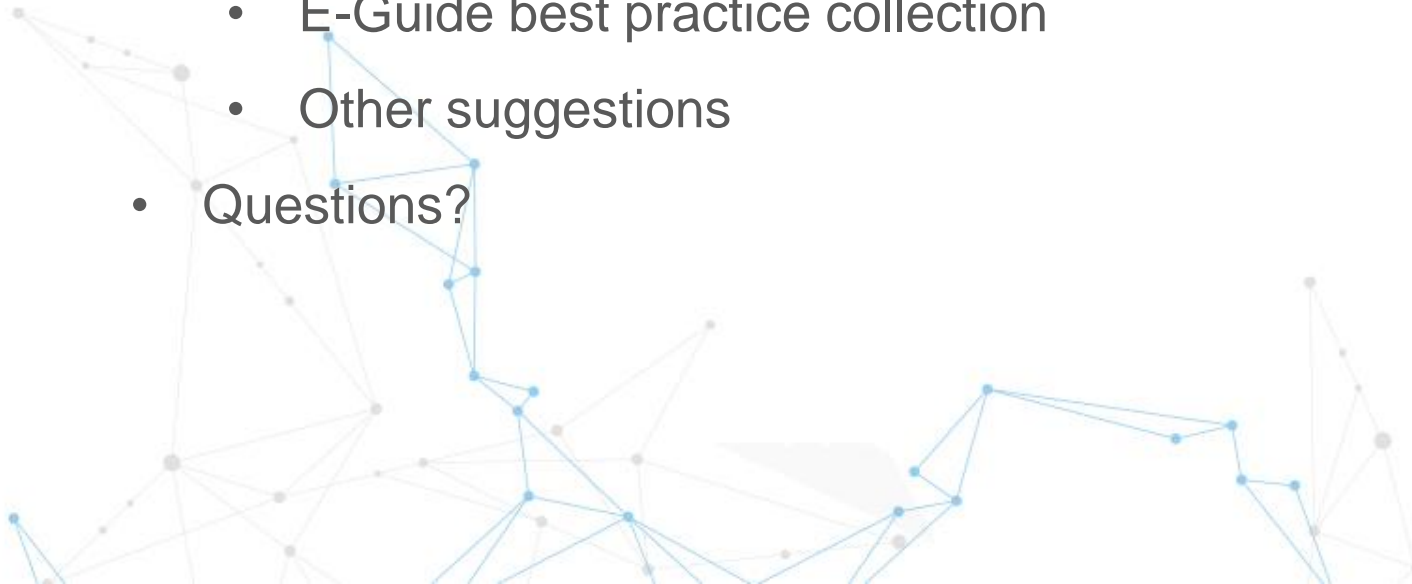
Conclusion of day 1

Alfonso Lara Montero

Chief Executive

European Social Network

Dinner – 19:30

Restaurant - Rosengarten am Engelbecken

Legiendamm 2, 10179 Berlin