

Cheshire County Council

Whole Systems strategic modelling project

Project proposal submitted by

The Whole Systems Partnership

and

Peter Fletcher Associates

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Peter Fletcher Associates

HOUSING, HEALTH &
SOCIAL CARE CONSULTANCY

1 Introduction

Cheshire Social Services Department have developed a range of Commissioning Strategies for adult services, people with a learning disability, services for older people and children's services. These reflect broad commissioning intent in the context of known capacity and need.

However, there is a desire to translate these strategic statements into a more coherent set of projections based on a quantified, whole system appreciation of the key questions of capacity and demand. Such an approach will need to support market management and partnership development with other agencies. It will also need to meet the internal needs of the County Council to support durable county-wide commissioning frameworks, the quantified assessment of demand, a better match of provision to demand and therefore more effective use of County resources.

Each Commissioning Strategy faces its own challenges in building this quantified, whole system approach. The approach proposed will therefore provide a consistent framework for applying whole systems strategic modelling but will start with a range of focussed issues chosen by each lead Chief Commissioning Manager. The process will be open to key partners with briefings being made available at regular intervals.

The objective will be to support the development of a dynamic relationship between the changing environment in which strategic commissioning needs to take place and the tools and approaches available to those responsible for this activity.

2 Proposal

2.1 Broad approach

The proposal is based on a systems modelling approach using 'ithink' software that relies on translating people's perceptions of how care systems operate and translating these into quantified models within which different scenarios and sensitivities can be tested. In simple terms the process can be described as:

1. Defining the boundaries and key questions to be addressed within a care system, for example, '*within the care home sector and over the next 10 years what is the likely balance of transitional v's long term care provision that will be needed?*';
2. Identifying the 'mental models' of people who use or who are part of this care system and translating this into a map of the system with a focus on the key questions identified above;
3. Working with the commissioning team to quantify this map in such a way as to explore the behaviour of the system over time and then to feed this into the strategic commissioning decision making processes.

The Whole Systems Partnership has a wide range of experience in supporting clients in developing this approach as part of their strategic functions. These are outlined in the appendix attached.

2.2 Specific proposals

The following specific proposals are made to support the approach outlined above in a way that meets the current needs of the Social Services Department:

1. That a meeting be held during the first half of November with Chief Commissioning Managers with the purpose of:
 - a. Outlining and demonstrating the approach being proposed;
 - b. Exploring the key question(s) relevant to each strategic commissioning area;
 - c. Agreeing a small number of people with whom to meet on a one-to-one or small group basis to gather local intelligence about care systems that are relevant to the key questions identified.
2. Through desk work using local strategic documents and reviews alongside individual discussions we would develop a set of simple qualitative models as a basis for addressing the questions raised.
3. At a subsequent meeting of Chief Commissioning Managers in December these high level qualitative models would be shared and refined to form the basis of quantification;
4. During January 2005 the consultants would gather the relevant data to populate the models and develop simulations and scenarios to test out possible answers to the initial questions raised. The models would be based on:
 - a. Key objectives within local commissioning strategies relevant to the issues being addressed;
 - b. The views of individuals canvassed throughout the project;
 - c. An understanding of national policy context;
 - d. The development of possible 'futures' reflecting all of these.
5. In February a further meeting of the Chief Commissioning Managers would consider the models outputs/scenarios and agree any refinements and next steps which could take the form of one or more of the following:
 - a. Wider dissemination and sharing of the models to build strategic partnerships including presentations and/or the development of web based models;
 - b. The in-house development of systems modelling skills and experience;
 - c. The application of the approach to a wider range of strategic commissioning issues.

The group of Chief Commissioning Managers will effectively operate as a project team/steering group for the work. However, The Whole Systems Partnership and Peter Fletcher Associates would operate as an 'external project team' meeting regularly to draw together the views of the Commissioning Managers, local discussions, National policy drivers and national and local data sources to develop the whole systems commissioning models.

2.3 Project outputs

The outputs from this project would include:

1. Quantified models relating to four key issues across the Department's Commissioning Strategies - one issue for each of the four commissioning strategies;
2. An enhanced understanding for the Department of the key drivers and potential impact of commissioning strategies;
3. The development of a methodology for developing quantified assessments of commissioning intent;
4. A basis for wider engagement with partners in the commissioning process.

3 Relevant experience

3.1 Projects undertaken

The Whole Systems Partnership provides specialist consultancy to health and social care partners in strategy development, particularly where this requires close partnership working and an understanding of strategic impact on whole systems. The Partnership supports clients through its programme areas, which regularly overlap to provide an integrated solution:

1. Partnership development and support;
2. Whole systems strategy and service reviews;
3. Whole system dynamic modelling;
4. Project and programme management.

The Partnership is currently supporting two major projects using a whole systems modelling approach:

- Shropshire and Staffordshire Strategic Health Authority – a project to build a macro-modelling tool to address key issues of capacity over the medium to long term in order to inform strategic investment decisions across the health economies;
- Audit Scotland in partnership with NHS Tayside – a project that is undertaking a national review of Delayed Transfers of Care. The Whole System Partnership is providing facilitation, coaching and technical support in modelling local systems and developing an understanding of local impact of initiatives to alleviate the problems that delays cause to the whole system.

The Partnership has undertaken a wide range of projects that have entailed working with local health and social services teams in modelling local systems with a view to improved understanding of capacity requirements and increased integrated working. For example in:

- Leeds – long term care needs of older people, including those with mental health needs;
- Leeds – long term care needs of children looked after;
- Leeds – impact of care home closures in the context of winter planning;
- North Kirklees – capacity requirements for intermediate care services;

- Cumbria – capacity model of N Cumbria health and social care system;
- Torfaen – systems model for the introduction of a new reablement team into the local system of care;
- Blaenau Gwent – delayed transfers of care;
- Monmouthshire – development of a local community hospital.

Peter Fletcher Associates (PFA) undertakes national and local research and consultancy on strategy and service development across all the community care groups, and the wider range of service user groups covered under Supporting People.

The whole system approach works across health, social care, housing and regeneration, and through Local Strategic Partnerships into the wider well-being and prevention agenda which impacts on the ability of vulnerable people to live independently - for example transport, community safety, leisure and lifelong learning.

Key elements of the approach include:

- Building approaches which include citizens, service users and carers as partners in developing ideas and initiatives for change to support independence and well-being. This approach, which can be adopted at both local authority level (e.g. Newcastle), and neighbourhood level (e.g. Anfield in Liverpool) as part of regeneration initiatives, can bring evidence and learning to commissioning and system change;
- Developing whole system strategic commissioning approaches with a range of partners in both unitary (e.g. Liverpool, and Knowsley) and two tier authorities (e.g. County Durham). The learning from this work has been further developed in Strategic Commissioning workshops run by Peter Fletcher Associates and Birmingham University, and will shortly be published by the Department of Health's Change Agents Team in the form of a Strategic Commissioning Workbook;
- Working with authorities on new partnering approaches with providers to commission for change (e.g. Manchester; Portsmouth).

PFA and the Whole Systems Partnership have experience of working together, and blending their skills and experience to provide added value in the developing whole system commissioning strategies and models. Examples include:

- Assessment of need and commissioning strategy for older people in Knowsley and St Helens. This included the development of a modelling tool and methodology;
- Feasibility and consultancy support for developing a Commissioning Collaborative across the 6 PCTs and 2 social services departments in County Durham and Darlington.

Other examples of work by PFA include:

- Assessment of need and housing, social care and support commissioning strategies for:
 - older people (e.g. Liverpool, County Durham, Ceredigion, and Hartlepool);
 - people with a learning disability (e.g. Liverpool);
 - people with mental health problems (part of the King's Fund Inquiry team on the mental health of Londoners).

- Support for Manchester City Council on the development of a business case for re-design of older people's services through partnering arrangements with providers;
- Older People's Partnership Initiative in Anfield and Breckfield, Liverpool;
- Review of out of hours services across social services, health and housing in Gateshead;
- Commissions for the broader range of service user groups covered under Supporting People, including SP Shadow Strategies, assessments of need and current work developing 5 year Supporting People Strategies for a range of authorities including Cumbria, Worcestershire, Sandwell, Wolverhampton, Middlesbrough, South Tyneside.

3.2 Consultants supporting the work

The Project Lead from the WSP/PFA partnership would be provided by Peter Lacey who has a General Management and health background with commercial and voluntary sector experience before joining the Health Service at a Regional Health Authority in 1990. Peter has extensive project management experience and provides training in project management, business planning and systems modelling to a wide range of clients.

He has worked extensively on capacity mapping and systems modelling using a facilitated approach coupled with simulation software to engage with partners in understanding the behaviour of complex systems. Peter also works closely with the NHS Information Authority in developing Information Strategies to support NSFs and was responsible for developing the Older People's Information Strategy. Peter completed an MBA at Durham University in 1998.

Geoff Lake has extensive executive director experience in the Health Service as a Director of Performance and Commissioning in Leeds Health Authority. He led the Northern Region SSI/RHA Change Agent Team for twelve months. He was previously Deputy Director of Social Services in Humberside, and lectures regularly on current university social work programmes. He is a qualified social worker.

Geoff was awarded the Office for Public Management Public Sector Leadership Award in 2001, for work in developing older people services. He specialises in:

- Working at the interface of health and social care particularly in its impact on strategies for older people services, including mental health;
- Developing partnership arrangements/approaches which represent whole systems thinking, and take account of the total environment in which service users interact.

Peter Fletcher is the Director of Peter Fletcher Associates (PFA), an independent consultancy which undertakes research and social policy analysis for government departments and national bodies, and research, strategic and development consultancy at a local level for local and health authorities, partner agencies and providers. He chairs the Board of Housing 21, a leading national RSL specialising in services for older people. He is also secretary to the Joseph Rowntree Foundation Task Group on Housing, Money and Care for Older People.

Peter has extensive experience in needs assessment, whole system strategy development across social services, health and housing and the broader LSP agenda, and partnership, engagement and capacity building work with citizens and service users. He has also led the PFA work on strategic commissioning. Examples of

relevant PFA commissions are provided earlier in the proposal. Before setting up PFA Peter was a Director for 10 years of Anchor Trust, setting up all its early home care services. He was also seconded to the Department of Health as a member of the Community Care Support Force.

The Whole System Partnership would also draw on the experience of other members of its team including analytical, modelling and web development skills.

Contact details:

www.thewholesystem.co.uk

peter.lacey@thewholesystem.co.uk & geoff.lake@thewholesystem.co.uk

mobile contacts: 07834 209461 & 07931 194876

office numbers: 01423 340585 & 01377 272265

The Old Crown, Farnham, North Yorkshire, HG5 9JD

Peter Fletcher Associates

Chesterwood Grange, Haydon Bridge, Northumberland NE47 6HW

Tel: 01434 684944 Fax: 01434 684945

Email: info@peterfletcherassociates.co.uk