Care Services Efficiency Delivery
Homecare Re-ablement Toolkit

Designing a High Level Pathway

Using workshop sessions to design the new pathway

Mapping a user’s optimum pathway through your council’s social care services, and agreeing the position of the homecare re-ablement service within the pathway, requires the input and collaboration of a number of colleagues.

One of the best ways of achieving this is to gather the right people together in a workshop session.

- Objective

When running a high level pathway workshop, remember that you are trying to implement, expand or improve your homecare re-ablement service and that your new pathway needs to support this.

- Who to invite

When facilitating this kind of session, it is important to get the right people in the room. Typically, these need to be senior people (e.g. AD, head of service, senior representatives from Finance and Commissioning, project manager and external suppliers / 3rd sector) as well as key operational managers, because they must have the strategic view to understand operations at a high level, and the seniority to make fundamental decisions about the future structure of the overall service. You may also want to include service users in the group.

- Workshop structure

To begin, you might want to ask the group to consider the following questions:

- How will homecare re-ablement be positioned as close to the front end of the service as possible e.g. access team, single point of access, intake team?
- How will it be clear that homecare re-ablement is the next step for the majority of your service users as they pass through the front end?
- How will homecare re-ablement be in step or aligned with other processes?
- How will homecare re-ablement be positioned correctly to ensure that service users can exit the service promptly and effectively?
To help you answer these questions and design your high level customer pathway, you might need to ask the group to consider the following:

1. What will happen to service users as they enter the service?
2. What will happen to service users during the service?
3. What will happen to service users as they exit the service?

You may want to map what happens now, i.e. the current ‘as is’ pathway as well as how you want your new pathway ‘to be’ in the future. Mapping the current pathway will help you understand the current processes and how teams work within it. However, it is important to focus most effort on the new customer pathway and how you want things ‘to be’. Only by getting the ‘to be’ pathway right, will you be able to deliver your vision and business case for homecare re-ablement.

Remember:

1. Service users will enter the service from a number of sources. These may include hospital referrals, community referrals (either through a universal contact centre or from social workers in the community) and referrals from other specialist teams. Describing and understanding how these routes work, and what the anticipated volumes from each might be, is a critical first step to setting up the high level pathway in a logical manner.

2. While in the service, service users will receive a variety of specialised interventions, e.g. core homecare re-ablement, OT support, support around equipment and assistive technology, etc. Defining, at a high level, what will and what will not be provided, e.g. a bathing service or end-of-life care, can enable you to match the service up with the referral stage.

3. Simplifying the exit routes of a person from the service, both those who do need ongoing care and support and those who do not, is as important as simplifying the referral route and entry to the service.

- Running a high level pathway workshop – top tips

Pathway design workshops can be challenging as they take significant time and frequently people in the group will have different ideas and points of view.

The most common challenges when developing a pathway is keeping the working group focussed on the right thing and at the right level. In particular, watch out for the following:

- Avoid getting into too much detail for each of the service areas. Keep focussed on the high level. Whilst detailed process design is
important, there is no point going into too much detail before the overall high level pathway has been agreed. To keep people focussed, it is a good idea to capture people’s detailed observations on a sheet of paper, ‘For further detail’, effectively ‘parking’ these points for a future process design session, before returning to the high level discussion. For example, you do need to identify how a service user will come in to the service, i.e. contact centre or intake team but you do not need to discuss the initial assessment form. This requirement should be captured on the ‘For further detail’ sheet.

- While it is important to understand the ‘As-Is’ process, avoid giving it too much attention. When describing and discussing the future pathway for the service user, the focus of the discussion needs to be on the ‘To-Be’. Briefly map the current pathway but concentrate on identifying the new pathway; any current problems / issues should be noted on a separate sheet of paper called ‘For fire fighting’, which can be re-visited, if they need addressing in the short term. Designing and implementing a new high level customer pathway should in any event resolve the problems.

- Avoid being distracted by a long list of issues from other services. It is important to keep the focus on homecare re-ablement within the high level pathway. Be prepared to capture on a sheet of paper ideas that are ‘Out of Scope’ i.e. that risk distracting you from homecare re-ablement and designing the new pathway. Equally, if an issue keeps cropping up that you can’t do anything about, the way to avoid it clogging up the discussion is to write it down as being ‘Out of Scope’.

- Avoid too much focus just on the process. There is often the need to spell out options and decision required eg: the council’s position on the application of FACS as an entry criteria. It is worth capturing those decisions that are necessary but which cannot be made in the immediate session as being ‘For decision’.

The approach you follow for mapping out the high level pathway is quite similar to that used in process design, so when planning high level pathway workshops you might find other sections in this toolkit useful, including ‘How to run a process design workshop’ and ‘What to watch out for when designing a process’.

Be aware, however, that for the high level customer pathway, you will be mapping the end to end process at a higher level (sometimes referred to as Level 0 or Level 1), whereas you will be process mapping the six-week homecare re-ablement service at a more detailed level (sometimes referred to as Level 2 or Level 3). For more information, see the toolkit section on process design.