

Worcestershire County Council trebles vulnerable client case load, fulfils Deputyship role in 90% of cases and is set to become a 'Preferred Provider', thanks to Caspar from Trojan Consultants.

Worcestershire County Council is committed to helping vulnerable residents live more independent lives. Today this remit includes looking after the finances of over 350 dependent individuals.

This is almost a three-fold increase on the local authority's case load of a few years ago. At that time, the Council was limited in the work it could take on, yet unable to justify adding more resources so that it could help more clients. The only way out of this cycle was to improve process efficiency.

Although core information and finance systems existed for the wider Authority, Appointee and Deputyship finances had to be handled separately. The sums involved belonged to individual clients, and had to be accounted for in this capacity – and reported to the Court of Protection, and the Office of the Public Guardian. Without a dedicated IT system, much of this happened manually.

“We had one full-timer and one part-time person doing all of this work, juggling paper files and electronic folders to keep track of everything, reconciling bank activity and coding slips for the finance team. It was very time-consuming, and unsustainable,” says Finance Officer Gail Hillson.

“We had the constant worry of potentially missing something important, and spent most of the time fire-fighting. Worst of all, we were turning away referrals because we couldn't meet demand.”

Because of the capacity constraints, the majority of clients were Appointeeships rather than full Deputyship cases, where the Council takes on responsibility for more of clients' affairs - such as banking, occupational pensions and tenancy agreements. Before automating its case handling, Worcestershire County Council filled the Deputy role in just 40 of its average workload of 130 cases. This limited what it could do for clients and, in turn, restricted the service's income and resources.

Caspar unlocks caseworker capacity and transforms reporting

It was at an Association for Public Authority Deputies meeting, that Gail and her manager were introduced to Caspar from Trojan Consultants – a purpose-built system for local authorities managing and reporting on the finances and affairs of vulnerable clients.

“I remember that day like it was yesterday,” Gail says. “Caspar’s look, its ease-of-use, the way it flows through the tabs when you first sign in, the ability to hold all information in one place - it was so professional. I was very excited by its Finance functionality!”

She describes Caspar as ‘running itself’, being so self-explanatory that she and her colleague could use it intuitively, even though training was available to them. “Just knowing where everything was, being able to answer queries on the spot by phone, and set up new plans effortlessly - it was transformational,” she notes. “Everything is documented too. Our internal auditor loves it.”

Official reports to the Court of Protection and Office of the Public Guardian, meanwhile, are easy to produce. The Council generates upwards of 10-15 of these monthly. “Previously, each would take up to 2 hours; longer if something didn’t balance,” Gail says. “Now, each report takes half an hour, if that. And there’s less risk of errors, because Caspar pulls all the latest information through, without us having to enter or recreate everything manually each time.”

Quality of life improves for all

As a result of all these efficiency gains, Worcestershire County Council is now managing more than 350 vulnerable-client cases, over 90 per cent of which are with full Deputy authority. Its dedicated team of 1.5 is now a team of five, including three permanent members. This increase is justified by the soaring workload and scale of representation, and the fact that the Authority is able to provide a full service, including regular client time, without compromise.

“The Caspar system means we can do more for more people,” Gail says. “By taking over vulnerable clients’ finances, ensuring their bills are paid on time, and that they get everything that’s due to them, we’re able to give them back a quality of life they may not have had in a long time. The plan now is to expand our team further, and become a ‘Preferred Provider’ for new referrals, which Caspar will enable us to do. It’s very clever software.”

“Caspar has had a huge impact for me personally,” Gail adds. “It brings new job satisfaction, as I can now perform my role in a more controlled, efficient and professional way, without stress.” For Trojan as a supplier, she has nothing but praise. “The customer service we’ve received has been absolutely wonderful,” she concludes. “I’d recommend Caspar to anyone in our position.”

Talk to our team to find out more



www.trojanconsultants.com



sales@trojanconsultants.com



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