

Gloucestershire County Council's annual Deputyship caseload capacity tops 500, as Caspar from Trojan Consultants streamlines financial administration and automates auditing and reporting.

Ten years ago, Gloucestershire County Council handled a Deputyship caseload of around 150 clients per year. Much of the financial management and administration happened manually, using paper and spreadsheets. Decision-making wasn't very spontaneous, because case workers had to look back through their files for details of recent spending and the latest account status. It was also difficult for co-workers to collaborate on client files. There wasn't a standard way of recording things, and it was impossible for two people to access the same files at once unless standing over each other's shoulders.

A rising need for reporting rigour

The biggest issue of all for the Council was that, although teams were handling substantial sums of client money, investments and property assets, they did not have a satisfactory way to demonstrate that everything was being recorded and looked after properly.

"The system in place wasn't sufficient to assure the powers-that-be that everything was as it should be. The Council needed a bit more rigour around its processes and information capture," explains Richard Thorne, Lead Officer for Client Affairs. "This was before I joined, but I have a good sense of the situation beforehand and I know that it involved a lot of ledgers being filled in with pen."

When Gloucestershire Council went to the market for a more formal solution to Deputyship case management, it found just one software solution that was fit for purpose – Caspar from Trojan Consultants.

Consistency improves control

Caspar is a purpose-built software system for local authority teams managing and reporting on the finances and affairs of vulnerable clients, developed with direct input from users of the software.

The benefits were immediately apparent. "Caspar has brought uniformity and consistency to how casework is recorded - and where - which means it's very easy to pass work between case workers, and for colleagues to collaborate on the same case," Richard says.

"There has been a big drive in the Council to reduce use of paper on site, and Caspar helps us organise everything – with the ability to scan documents, and keep notes," he continues. "It

means we've been able to distance ourselves from the large paper files teams used to rely on."

Soaring caseload capacity, improved client response

In common with most other councils, Gloucestershire has a waiting list of client referrals, but since using Caspar its teams have been able to substantially increase the volume of cases it can take on. A decade ago Gloucestershire Council typically processed around 150 Deputyship client cases annually. Today, its team of 15 handles just over 500 cases annually, and is able to absorb around 10 new cases per month. All of these are full Deputyship cases, too – which carry greater powers of responsibility compared to Appointeeship cases (the Council retains just 30 legacy cases on this basis today).

Combined client assets across Gloucestershire's current caseload are worth between £20 to £30 million, excluding properties. But, thanks to Caspar, keeping track of everything is effortless. "We can readily monitor accounts, and view whether money is going up or down," Richard says.

"Clients see the benefit too, because we can respond more quickly to requests as the information we need about funds available, or similar spending, is right there at people's fingertips. This accelerates our decision-making."

Instant reporting

Auditing and external reporting (to the Office of the Public Guardian, for example) is quick and easy, too. "It's pretty much at the click of a button now," Richard says. "Previously, there would have been a lot of work to do to beforehand - to add everything up, calculate funds and what has been

spent - with heavy reliance on spreadsheets, and extracting data from them," he explains.

"With Caspar, most of that work has already been done as part of ongoing financial reconciliation, so OPG reporting is very simple. We can also be very confident in the accuracy and reliability of the figures too, as Caspar has done all the calculations, meaning there are no errors."

Continuous evolution

As the software's developer, Trojan is closely attuned to the evolving needs of the Deputyship market, ensuring that the Caspar system continuously reflects the latest market requirements, Richard adds. "Trojan are extremely responsive, so that when the OPG or Court make changes to what's needed, they're quick to issue updates and incorporate new document templates into the Caspar system, so we can absorb any new requirements seamlessly."

Above all, the efficiency enabled by Caspar means that Gloucestershire County Council can now process a much higher volume of client cases than ever before.

"Without Caspar, we would undoubtedly struggle with our current caseloads," Richard says. "There will always be a waiting list for referrals, but our strategy is to take on work with sufficient fees to enable us to take on additional staff. As long as that continues, so that the work pays for itself, we'll be in a good position to keep pace with demand. Caspar makes that possible."

Talk to our team to find out more



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