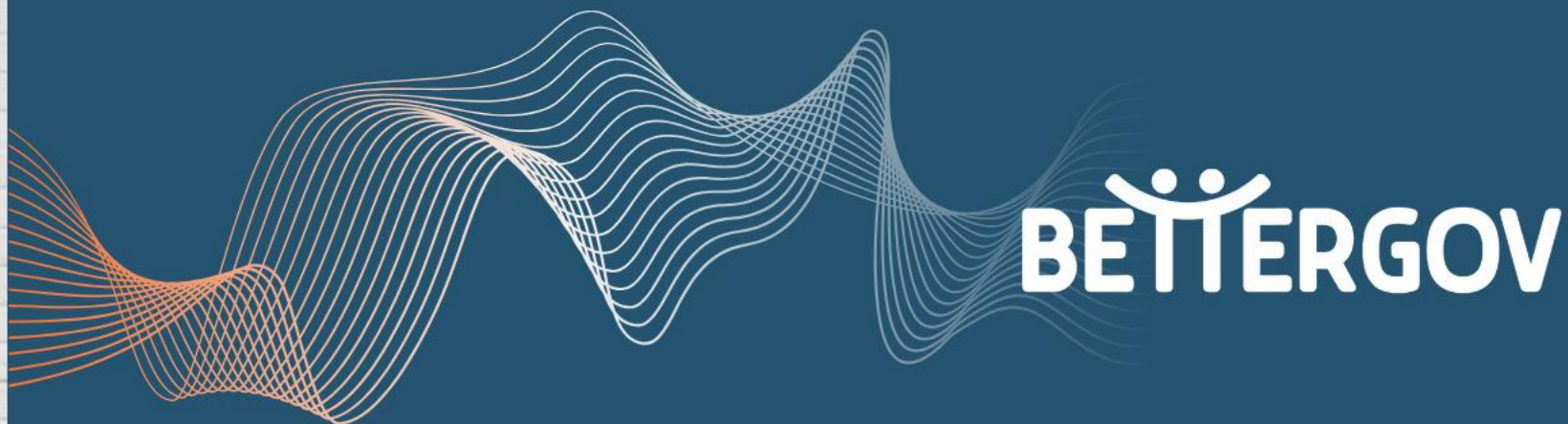




# Adult Social Care CMS Foundational Specification Project

September 2025

ADASS Webinar – 18/09/2025

## Disclaimer

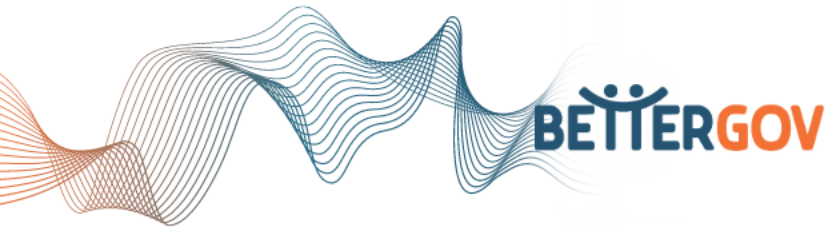
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# Agenda

- Introductions & Housekeeping – DHSC / BetterGov
- The Brief - DHSC
- The Approach - BetterGov
- The Engagement - BetterGov
- The Outputs – BetterGov
- Using the Outputs - BetterGov
- Next Steps and Q&A – DHSC / BetterGov



# The Brief

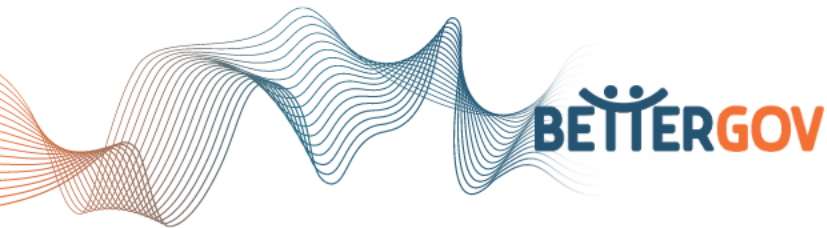
## Part 1

Part 1 of the project produced a strategic document focusing on key areas of CMS functionality and how these should or could be developed in future - Core Record, Interoperability, Data Analytics and Reporting, Self-Service and Portals, Non-Functional Requirements. This set the scene for Part 2.

## Part 2

“The project aims to improve CMS procurement by providing the LAs and suppliers with standardised CMS requirements. This will enable procurements to be more efficient and effective as there will be a shared understanding of what is required from CMSs. In turn this will encourage greater standardisation and enable wider innovation”.

Production of these standardised requirements will be based on working “ closely with local authorities, suppliers, market experts and relevant regulatory bodies, to create comprehensive, concise, and immediately usable guidance on CMS requirements. [The Project Team] will examine and incorporate stakeholders feedback into the specification guidance, test this with local authorities, as well as facilitate the development, publication, and adoption of the final guidance in the CMS market.”

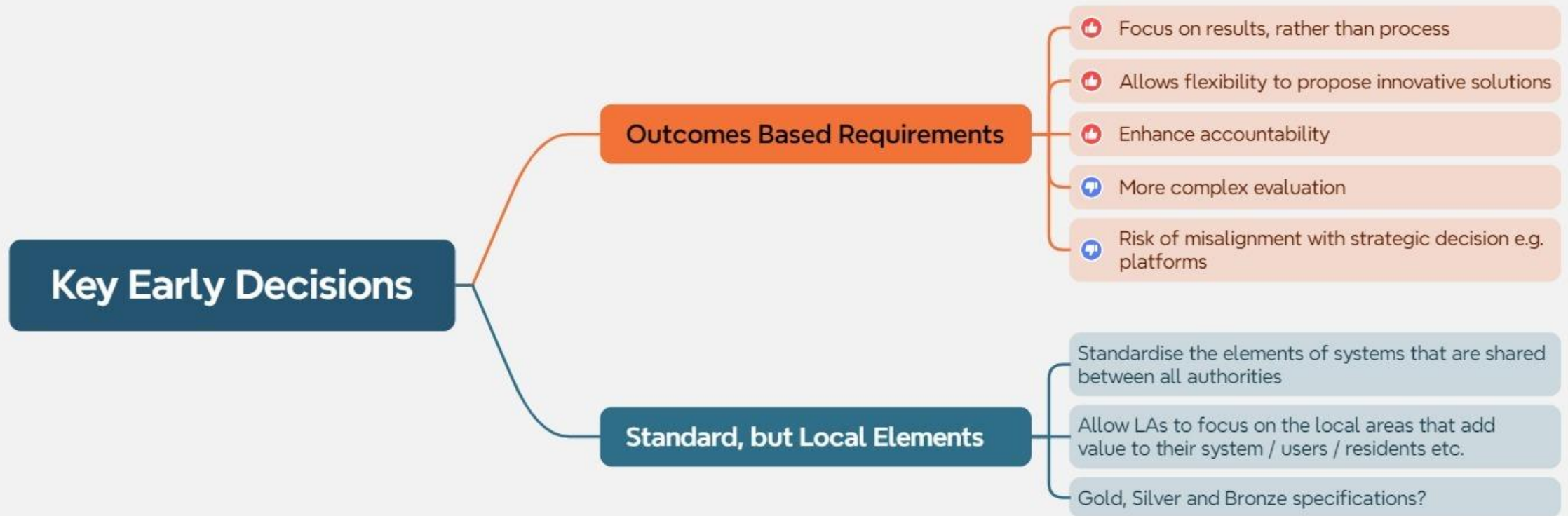


# The Approach

- Build on Part 1 of the Foundational Specification
- Focus on outcomes (what), not processes or functions (how)
- Produce a combined, cohesive set of outputs that can be 'plugged in' to a procurement exercise
- Be grounded in the now, but aspirational for the future



# Key Early Decisions





# The Engagement – Who and How?

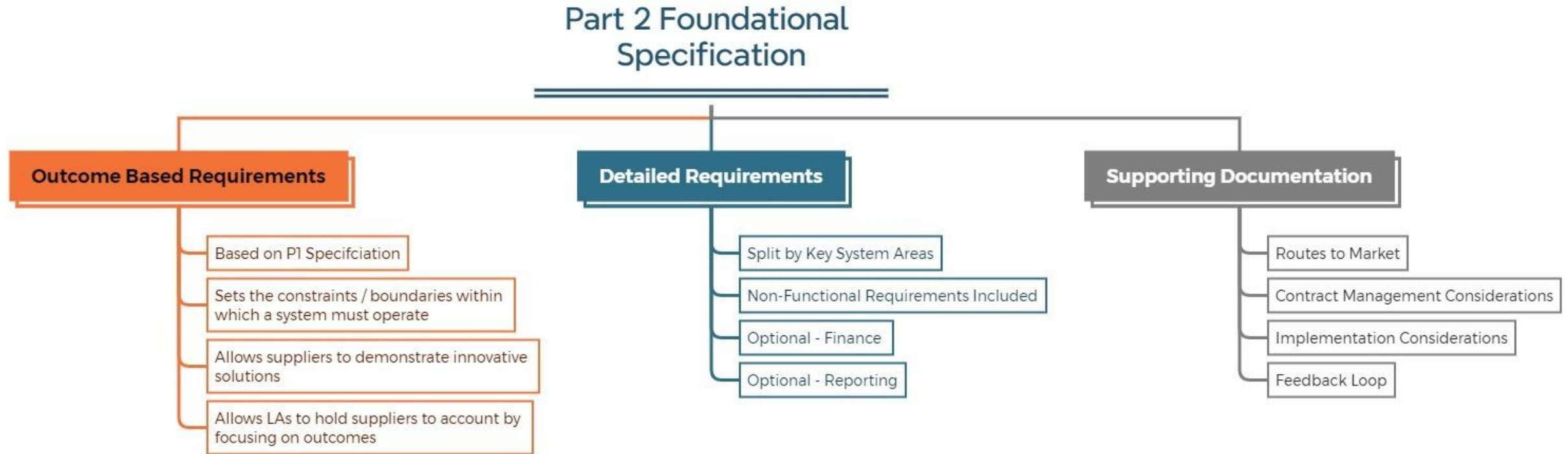
- Suppliers – Incumbents & other Case Management Providers
- YPO, ESPO and CCS framework providers
- 32 Local Authorities from across England
- NHS England Digital Policy Unit
- Department for Education
- DHSC Client Level Data team
- Various other sector SME's / Suppliers & interested parties

This took the form of:

- 45+ meetings with individual stakeholders
- 9 workshops with Local Authorities
- 4 Project Boards with representation from DHSC, DfE, NHS England and CCS
- Survey sent to every LA in England



# The Outputs - Foundational Specification Documents



# The Outputs

## Supporting Document

- Introduces the project, how the outputs were produced and their intended use
- Outlines considerations for LAs about procurement routes, contract management and implementation
- Makes it clear this is not an 'off the shelf' tool, but a building block that needs to be localised, reviewed and approved before use

## Outcomes Based Questions

- Includes an introductory framing section e.g. Our LA uses Azure, has 5000 users, uses Android phones etc.
- Outcomes based split by key sections, with introductions and further framing if required
- Outcomes based questions for key areas of functionality, linked back to detailed requirements for further detail
- Identifies where LAs will want to add or remove information, but this is not exhaustive

## Requirements Spreadsheets – Case Management / Finance

- Split into two as some authorities do not procure finance functionality with their CMS
- Detailed requirements, more akin to a 'traditional' procurement approach
- Also not exhaustive
- Links back to relevant Outcomes Based Questions

## Project Report to DHSC

- Includes feedback on the ASC CMS Market and the wider ASC Sector



# Using the Outputs

- They provide the building blocks for a procurement – they are not intended to be used verbatim.
- Set your own boundaries and outline your expectations
- Review, update, validate and approve before use
- The files are complementary to each other, but nothing is mandatory
- Consider user stories to add local colour to requirements

## 1. Local Considerations

### 1.1. Rationale

This section provides information about [insert authority name] that we consider relevant to the way in which the Case Management System (CMS) will be implemented, used and maintained. This is not an exhaustive list of non-functional requirements, which are in Section 10, but includes local considerations that potential suppliers should be aware of when writing their responses. Suppliers should ensure that proposed solutions are compatible with the following items, with suitable information given in the relevant answers to give [insert authority name] confidence that these are workable solutions.

### 1.2. Framing Information

- **Practice Model:**

We operate a [INSERT MODEL NAME] model of practice [examples: Three Conversations, Signs of Safety, Relationship-Based Practice]. The CMS must be able to support and reflect this model in workflow, recording, and reporting functions.

- **User Number:**

Adult Services contains approximately [XXXX] system users

- **Learning Management Solution:**

We use the [name] Learning Management Solution (LMS) and will want any self-service training or support to be based on this platform.

- **Hosting and Web Services:**

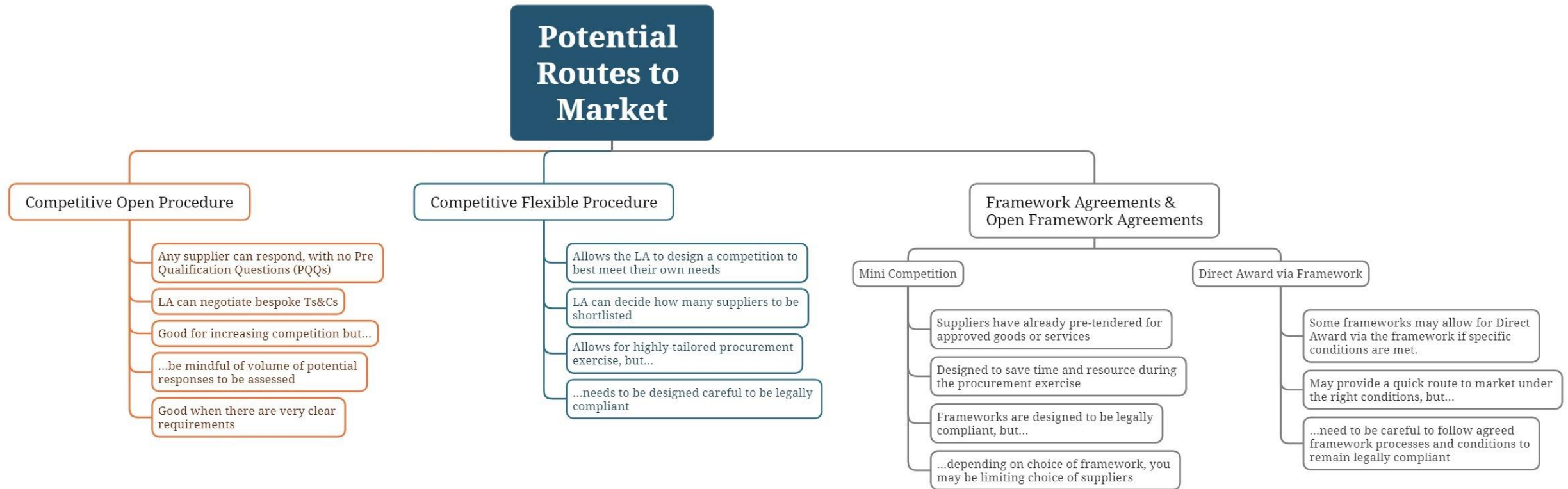
We operate a [insert here] infrastructure model, using [hosting service] exclusively for all infrastructure and hosting requirements. The proposed CMS

# Outcomes based questions

|      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                  |
|------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|
| CM04 | <p data-bbox="214 297 614 325"><b>Q: Case Recording / Activity –</b></p> <p data-bbox="214 332 1049 432">Explain how your system supports the recording, viewing, and management of case activity across the full spectrum of adult and children's social care. Your response should include:</p> <ul data-bbox="257 472 1049 1082" style="list-style-type: none"><li>• How the system enables detailed and configurable case recording (e.g. case notes, contacts, assessments, outcomes, service delivery, joint funding, risk, disabilities, hospital admissions)</li><li>• The ability to support recording outside of structured workflow (e.g. free-text notes, attachments, categorisation, tagging, significant events, cross-record copying)</li><li>• How case activity is surfaced in the user interface (e.g. case history, chronology, alerts, dashboards, visual progress tracking)</li><li>• How key client data (e.g. personal budget status, service provision, joint funding, LAC/fostering status, placements, accommodation) is recorded and accessed from the main record</li><li>• Functionality to manage and share live service availability (e.g. Shared Lives, fostering, housing), including integration with provider portals or commissioning tools</li></ul> <p data-bbox="214 1118 1049 1218">Please describe how the system supports real-time collaboration, data accuracy, user permissions, and auditability within the case recording environment.</p> | 3.038 –<br>3.071 |
|------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|

- You will need to tailor these to local use cases
- What is the challenge or issue we want to resolve by using the system?
- Let suppliers present innovative solutions made up of as many components as needed
- Provides the potential for collaborative exercises with suppliers to develop new features
- Makes it easier to hold suppliers to account for results, rather than just specific deliverables
  - Can shift focus to the user and away from specific features

# Routes to Procurement



- Direct Award and Direct Award via Framework are different things.
- Lack of proper planning is not a sufficient reason to undertake a Direct Award

# Evaluation Considerations

The Procurement Act 2023 introduces the principle of awarding contracts based on the Most Advantageous Tender (MAT). This moves away from using the Most Economically Advantageous Tender (MEAT) approach.

| Consideration        | MEAT                       | MAT                                                   |
|----------------------|----------------------------|-------------------------------------------------------|
| Focus                | Price + Quality (Economic) | Quality, Social, Environmental, Innovation, Price     |
| Price Requirement    | Mandatory                  | Optional                                              |
| Flexibility          | Limited                    | High                                                  |
| Social Value         | Considered                 | Can be made central to evaluation if required locally |
| Environmental Impact | Optional                   | Encouraged and Weightable                             |

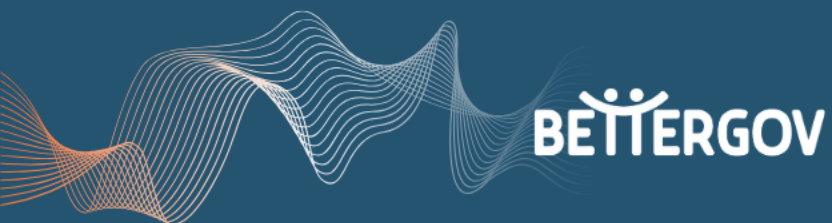
- Careful Design of Evaluation Criteria – clear, measurable and proportionate
- Use Transparent Evaluation Methodologies – be up front and assessment approach, score weightings and what may disqualify a bid
- Justify Weighting or Exclusion of Price – must be proportionate to the objectives of the contract and local need
- Consider and plan for flexibility in the criteria
- Prepare for the Evaluation – ensure staff are trained and supported, ensuring scoring is consistent, justified and well documented

# Next Steps

| DHSC Foundational Specification: Embedding |                               |                                            |                                                        |
|--------------------------------------------|-------------------------------|--------------------------------------------|--------------------------------------------------------|
| Date                                       | Event                         | Location                                   | Audience                                               |
| Mid Sept                                   | Publication                   | Hosting platform, Frameworks               | All interested LA's   LA's using frameworks to procure |
| Mid-Late Sept                              | Articles & Social Media Posts | Various incl. social media & sector papers | Interested stakeholders and wider sector               |
| 22 - 23 October                            | BG stand at NSCC Cymru        | NSCC Llandudno, in person                  | all attendees                                          |
| 26 - 28 November                           | BG stand at NCASC             | NCASC Bournemouth, in person               | all attendees, with potential for a workshop session   |

## Q & A





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