

Starting from Scratch

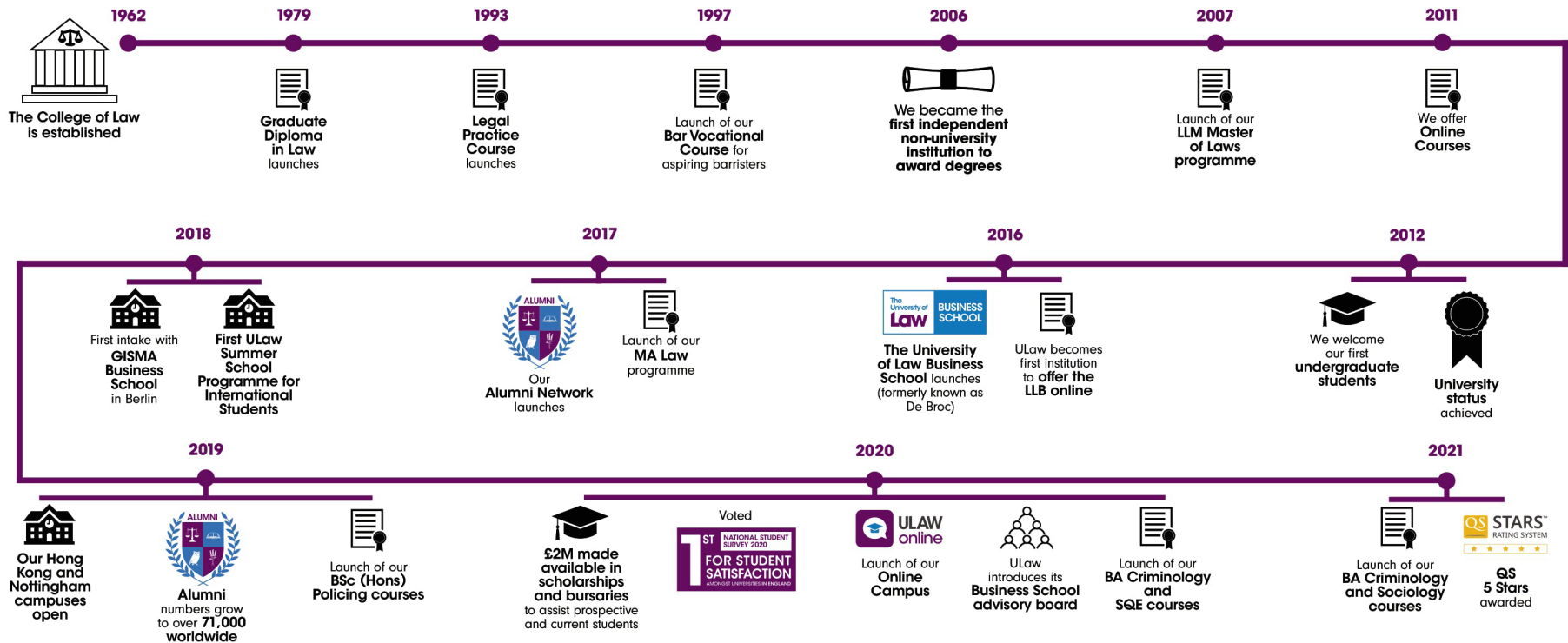
Implementing a Casework Management System

Keith Houghton, Director of Student Support & Wellbeing

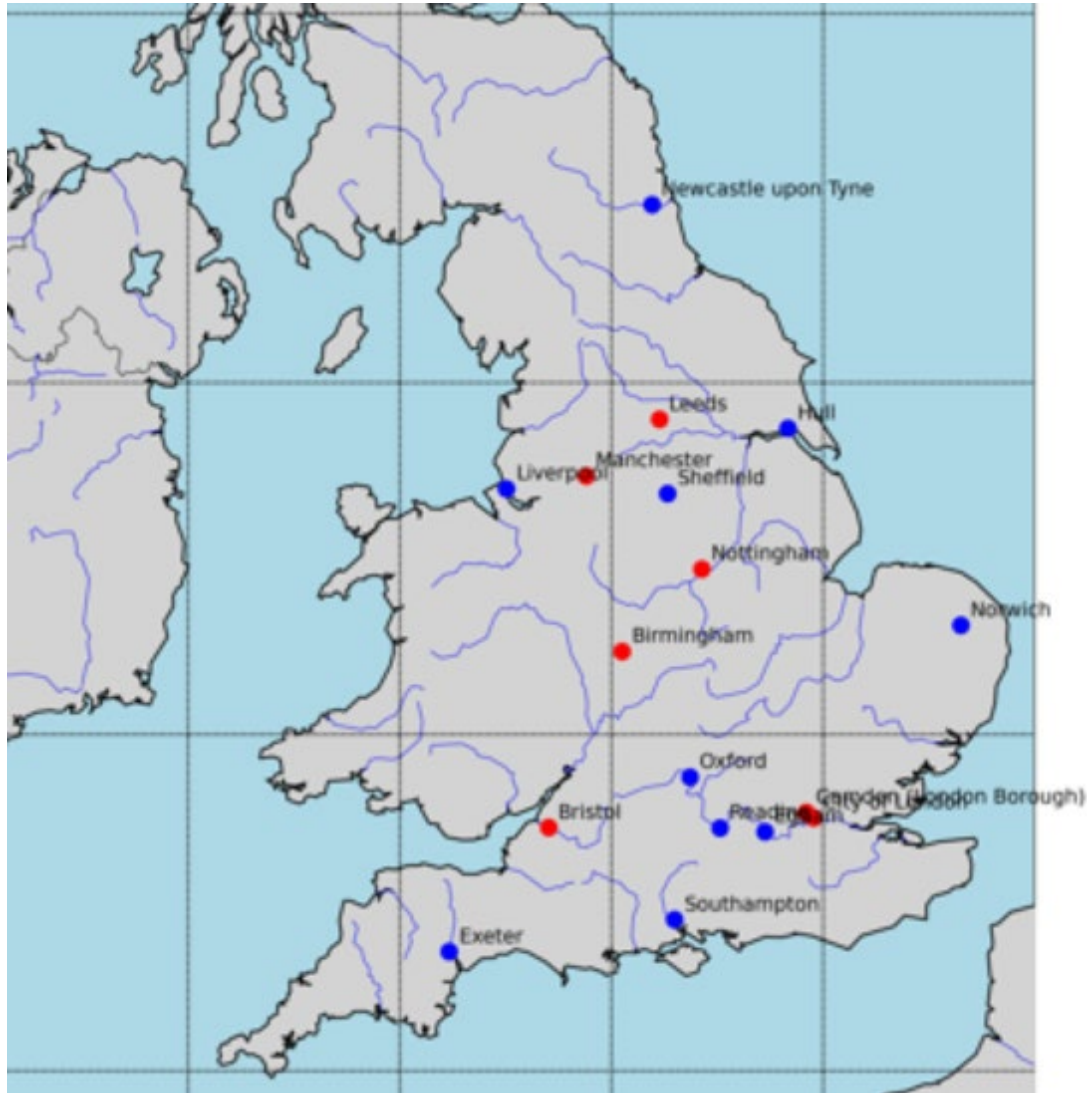
Agenda

- About The University of Law
- Reviewing current systems
- Defining system needs
- Defining outputs
- Selecting the right system
- Implementation
- Review and ongoing development

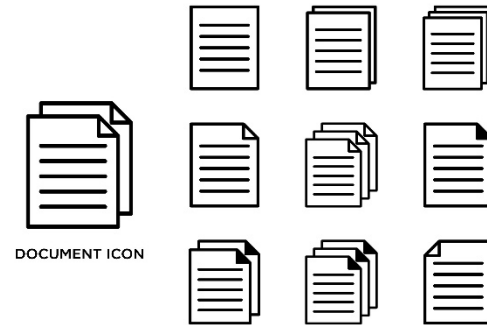
About The University of Law



Our Locations



Review of current systems



ID	First Name	Surname	Course	Campus	Issue	Advisor
0101010	Adam	Ant	LLB Law	Bloomsbury	Housing	JA
0101011	Betsy	Bains	PGDL	Moorgate	Anxiety	RD
0101012	Charles	Chester	Project Mgmt	Birmingham	Academic	BL
0101013	Davina	Daventry	LPC	Manchester	Money	SP

Review of current systems



Challenges

- Manual systems
- Not joined-up
- Inconsistency of data collection
- Impossible to monitor trends or risk
- Multiple access points
- Multiple records
- Concern of students being missed

What did we want?

- Single repository for service data
- Easy to use casework management system
- Scalable and adaptable to your ways of working
- Facilitate multi-disciplinary working
- Identify and manage risk
- Simplify processes
- Connectivity

Outputs



Robust data
dashboards

Exportable
datasets



Management
of risk



Trend analysis

Selecting a system

PLAN

- Be clear about requirements
- Fit for purpose processes

SELL

- Gain internal buy-in
- Business case

BUY

- Review a number of options
- Best fit for the organisation

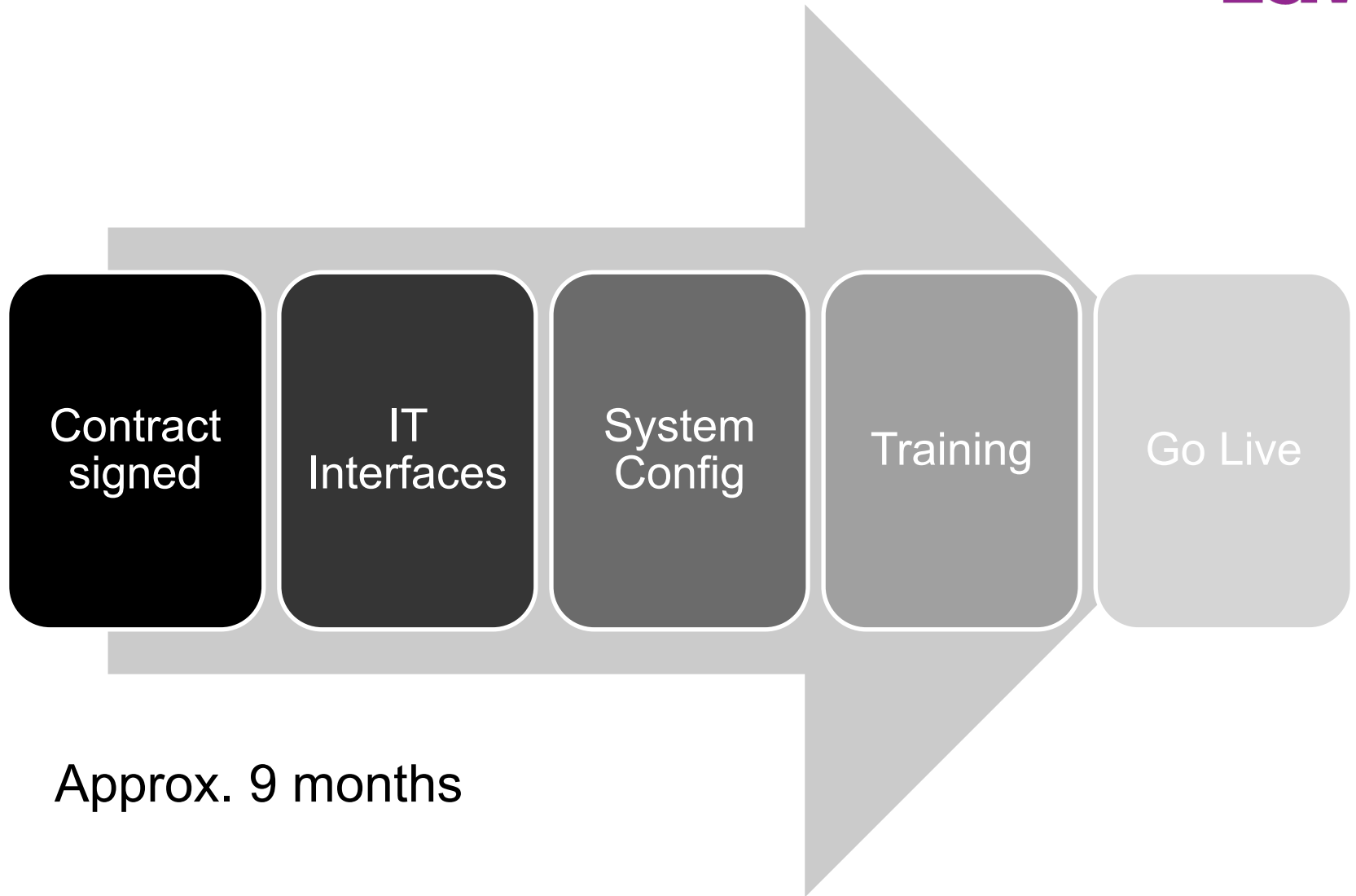
System Implementation

- Planning is key
 - Who needs access
 - How will you structure the teams
 - Who has access to what
 - How will you handle sensitive category data
 - Define enquiry categories
 - Define action types
 - Decide on templates
 - Decide on student access

Key Stakeholders

- Your internal IT department
 - System access and “whitelisting”
 - Student records system data interface
 - Learner analytics? CRM?
 - Tableau? Power BI?
- Your Implementation Manager / Team
 - Experts in the system you have selected
 - Will advise how others have deployed the system
- System “Champions”

Our Timeline



What Went Well?

- Staff adoption of the system
- Enthusiasm to develop the system
- Creation of a single point of access
- Single source of data
- Significant improvement and streamlining of inter-team referrals
- The sheer volume of data produced

What could have gone better?

- Too much enthusiasm resulted in over-complication of forms and categories.
- Reporting parameters could have been better defined.
- Teams and permissions were locked down too much.
- No clear “user manual” from a ULaw perspective – resulted in inconsistent ways of working

Plans for the future

- Further develop workflows and case action plans
- Roll out to other areas of the University that undertake casework (eg complaints; visa compliance; SVLO)
- Staff User Group to prioritise developments
- Student access to the system to they can view their case records directly
- Exporting data to Power BI Dashboards

Thank you for listening

Any questions?

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