

Report March 2010

CAIS Online software evaluation

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Contract No: 3080

Executive Summary

This report covers an evaluation of the CAIS Online case management system. It was commissioned by Glasgow City Council, which owns the CAIS Online system, and conducted by FMR Research Ltd during autumn 2009¹. CAIS Online was developed by Resolution Case Management, which operates a service level agreement with Glasgow City Council to provide support for the system. The present use of CAIS Online extends to almost 300 users across 3 local authorities, around three quarters of who are active at any one time. The main applications for the system are services providing money advice and services working in the welfare benefits field. The evaluation looked at two services. 'Service A', was a money advice service and has been working with CAIS Online for more than two years. 'Service B', was a welfare benefits service and was about to move from a paper-based case management system to CAIS Online at the time the evaluation was conducted.

Conclusions

The conclusions from this study are presented in relation to three key questions.

Can I provide a better service?

- Nine out of ten factors investigated showed improved performance whether moving from paper-based or pc-based systems. The previously perceived worst performing areas showed the greatest improvement.
- The main operational benefits of CAIS Online were the ability of frontline staff to have ready access to data and the ability to devote more time to client matters by having administrative time freed up.
- The service benefits offered by CAIS Online were presented in an environment which ensured system continuity, high levels of data security and cohesive system updating and development with significant user input via the CAIS Online user group which is operated by Resolution Case Management.

Can I save money?

- The annual saving for a local authority with ten of its services using CAIS Online and ten workers in each of the services, was estimated at **£150,000**
- When extrapolated across Scotland, should all Scottish local authorities adopt CAIS Online this could lead to a potential annual saving for Scotland of just under **£5,000,000**.²

Can I make better policy?

- The benefits of CAIS Online were particularly strong at the management level. This meant a greater ability to use the empirical data from service provision to inform policy development and also a greater ability to cascade the implications of policies and policy changes to service delivery.

¹ Report author: Dr Simon Haslam, Director FMR Research Ltd, simon@researching.co.uk: project reference 3080

² This figure is based on the assumption that each local authority has ten services operating CAIS Online and, within these, each service has 10 workers using the system. The figure doesn't take account of any scale related discounts that Resolution Case Management could offer local authorities on user licenses.

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- Managerial strengths of CAIS Online were around data analysis and report production, together with data quality. Having the benefit of more accurate and more comprehensive data from services means the quality of insight used to inform policy from services is raised.
 - CAIS Online also facilitates the easy amalgamation of data from a range of services, which meant policy recommendations could be more readily grounded in the data from across a service portfolio.

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1 Introduction

1.1 Background

This report covers an evaluation, commissioned by Glasgow City Council, of the CAIS Online case management system.

CAIS Online was developed by Resolution Case Management, which operates a service level agreement with Glasgow City Council to provide support for the system. The present use of CAIS Online extends to almost 300 users in 3 local authorities in Scotland, around three quarters of whom are active at any one time. The main applications for the system are services providing money advice and services working in the welfare benefits field.

The CAIS Online system is already hosted on a secure server and has failover/disaster recovery facilities in place to ensure continuity of service and data. This means that other local authorities and services looking to use CAIS Online in Scotland can do so without needing to invest in new IT infrastructure. There is a CAIS Online user group which is operated by Resolution Case Management. CAIS Online users pay a per-user licence of £350 per user per annum for ongoing support, technical back-up and help-desk facilities. Resolution Case Management also provides a suite of training programmes for new and existing users.

The evaluation looked at two services. The first, 'Service A', is a money advice service and has been working with CAIS Online for more than two years. The second service, 'Service B', is a welfare benefits service and was about to move from a paper-based case management system to CAIS Online at the time the evaluation was conducted.

1.2 Objective

The purpose of this work was to generate data capable of evidencing the potential benefits of adopting the CAIS Online software and approach in a Local Authority context.

This was approached by obtaining data from 'Service A', which now has good experience of the CAIS Online system and 'Service B' prior to its introduction of CAIS Online. Despite the focus of the two services being different and the populations they serve also being very different, the comparison of both data sets revealed some general themes about the likely benefits of organisations moving to the CAIS Online approach.

2 Method

The evaluation method was based on the use of a 'strategy canvas', which enabled the key factors for the service to be mapped against 'before' and 'after' performance levels, on one diagram³. This approach has been successfully used by FMR across a range of organisational and service evaluations and reviews.

The research involved the gathering of two types of data from two contexts, in each organisation. We sought quantitative data on productivity and time spent on activities relating to recording and reporting. We supported this with qualitative insight into working practices from interviews with people at an operational level. The research looked at home visit, outreach, reporting and multiple case situations – where it was believed the CAIS Online system offered distinct advantage.

At the more senior organisational level we gathered quantitative and qualitative data around collating information, the production of analysis/reports, the ability to link policy with practice and the contribution to the 'efficient government' agenda.

Our process had the following stages.

Stage 1 – project scoping and questionnaire development (with input from the two services as appropriate). This led to the creation of a blank strategy canvas as the framework for which overview data on each of the two services can be shown.

The strategy canvas shows the perceived performance of a service in relation to (in this case 10) selected factors, shown on the horizontal axis. The vertical axis is a 1 to 10 scale of performance, where 1 is low and 10 is high. The main role of a strategy canvas is to give the overall perspective on a service in a concise manner – the performance ratings for each of the factors are supported by qualitative and quantitative data, as appropriate.

In this context, we looked at two main stakeholder groups – 'policy/management' level and 'frontline'. Factors relevant to each of these groups in the evaluation were as follows.

Policy/management

- Ease of data analysis and obtaining management reports
- Ability to use information to link practice to policy and vice versa, in pursuit of best practice
- Overall sense of value for money in the way the service is delivered
- Ability of service to contribute to the 'efficient government' agenda

Frontline

- Service efficiency, the number of cases that can be dealt with over a given time period
- Ease of report writing and administration
- Ease of home visit working with clients
- Ease of outreach work with clients from community-based locations
- Ability to access up to date case information
- Ability to capably work on multiple case types

The research tools used with both services are appended.

³ The strategy canvas approach was made popular by INSEAD professors Kim and Mauborgne in their ground breaking 'Blue Ocean Strategy' work. See 'Blue Ocean Strategy: How to Create Uncontested Market Space and Make Competition Irrelevant (2005), Kim W. C and Mauborgne R, Harvard Business School Press

Stage 2 – data gathering from the ‘Service B’ context (pre-CAIS Online), including obtaining quantitative data (where this existed) and having face to face interviews with at least 4 practitioners and 3 people at management/organisational level. The analysis of the data led to the creation of a strategy canvas for Service B, showing the pre-CAIS Online situation and the service’s prediction for when CAIS Online is operational.

Stage 3 – data gathering from the ‘Service A’ context, including obtaining quantitative data (where this existed) and having face to face interviews with at least 9 practitioners and 1 person at management/policy level. The analysis of the data led to the creation of a strategy canvas for Service A, showing the pre-CAIS Online situation and the service current situation with CAIS Online operational.

Stage 4 – the presentation of the findings to an industry-wide group and the production of a report documenting the research approach, outputs and interpretation.

The field work was conducted in November 2009.

In adopting the strategy canvas for this study, our evaluation method drew on the benefits of a recognised framework for data analysis and insight generation. The approach we’ve taken in this project to populate the strategy canvas diagrams is based on the premise that those closest to the service are best placed to comment on it. This approach generates rich and intimate data, as a result of people’s familiarity with their own thought contexts, but it is not without methodological shortcomings. First is the recognition that sometimes people have difficulty seeing possibilities outside their own experience, especially when such possibilities might mean radical change. Second is the characteristic of ‘anchoring’, which means if a service is rated higher (nine or ten out of ten) in its current form, the possibility for better performance to be shown on the strategy canvas is curtailed, which means that even dramatic change may look less dramatic on the canvas. Third, the strategy canvas shows a single point against each factor, with this point being the average of individual ratings that people offered. This mean may disguise the degree of variance within the data (for example, is a mean rating of five the result of separate score of four and six or separate scores of one and nine).

Being aware of such methodological characteristics in advance of the study was obviously very helpful in the data analysis and insight generation stages of the project. The following section outlines the key findings from the analysis.

3 Key findings

This section of the report documents the key findings from the research. The first part of this section (3.1) is devoted to Service A, the organisation with strong CAIS Online experience and the second part (3.2) to Service B, which is about to adopt CAIS Online.

3.1 Service A

Service A is a third sector body which is funded to deliver services on behalf of a local authority. The organisation delivers a range of financial information and support services to its local community⁴, although the focus for this analysis is only the organisation's money advice service. The organisation has four service delivery staff dealing with money advice. Its CAIS Online data show 540 cases handled for year ending 31st March 2009. The local authority funds the serviced from three sources (Community Regeneration Fund, Social Inclusion Budget and Fairer Scotland Fund) to the total value of £270,396, but this covers not only the money advice work but also a welfare benefits service.

The organisation has administrative support staff who undertake most inputting of data such as creditors' details and account numbers onto the CAIS Online system. Prior to the adoption of CAIS Online about two years ago, the organisation had moved away from the use of a paper-based case management system a few years previously, and had used a locally developed software solution, based on MS Access. The service was delivered from its main office location, with outreach services via local housing associations, health centres, and community venues as well as home visits.

In this context, we looked at two main stakeholder groups – 'policy/management' level and 'frontline'. Factors relevant to each of these groups in the evaluation were as follows.

Policy/management

- Ease of data analysis and obtaining management reports
- Ability to use information to link practice to policy and vice versa, in pursuit of best practice
- Overall sense of value for money in the way the service is delivered
- Ability of service to contribute to the 'efficient government' agenda

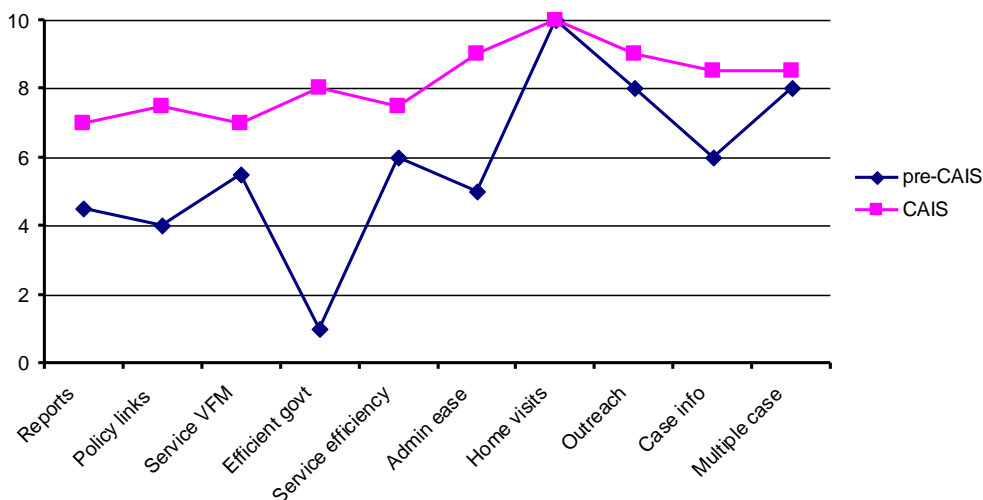
Frontline

- Service efficiency, the number of cases that can be dealt with over a given time period
- Ease of report writing and administration
- Ease of home visit working with clients
- Ease of outreach work with clients from community-based locations
- Ability to access up to date case information
- Ability to capably work on multiple case types

The overview of this service, based on information gathered to date is as follows. This shows the service in its current 'CAIS Online' form and how the service believed it performed before it was fully operational with CAIS Online.

⁴ The area has a population of about 90,000 and a male unemployment rate of about 10%.

Service A (CAIS Online operational)



The information supporting this strategy canvas, for each of the ten factors in the canvas, is shown below.

3.1.1 Ease of data analysis and obtaining reports

This was currently rated as 7 with CAIS Online, compared to a rating of 4.5 before CAIS Online.

Reporting productivity

From the service's own perspective, it felt the previous MS Access-based approach was both capable and sufficient.

"Could get quite a lot of reports out of the old database, we could break it down as narrow as that – credit and debit issues this week."

"It was very simple... you could run any number of queries."

The main reason for this was that the service had the MS Access database designed specifically for their needs, so there were no shortcomings on its reporting capabilities. Some of this reporting capability was not present in the CAIS Online system at the time this research was conducted (though the developers plan to incorporate this with CAIS Online in the very near future). The reason for this seeming lack of functionality was that CAIS Online was designed to meet the information and reporting requirements of its funders, which may have differed from the reporting/data requirements that other funders of a service may need. For example, CAIS Online will provide information on the number of cases being handled by a service but, at the time of writing, had no straightforward means of presenting data about the number of contacts that a service had with service users over a given time period (though this requirement for other funders is being incorporated in CAIS Online).

"The system doesn't capture the client who is coming in for an update (on a current case). You write it into your notes but the system doesn't pick it up."

The service's strategy for dealing with what they saw as a partial reporting capability of CAIS Online was to operate a separate database to capture the data that CAIS Online found difficult to report against.

"We have our contact sheets, our clerical sheets. These are entered onto another database (Excel). Filled in by hand and the admin team do the entering."

The switch to CAIS Online meant the re-entering of data and the process of learning a new system for the organisation, both of which had a short term impact on productivity.

"Its just that until you get used to using it."

Performance

The perspective of the local authority officer with overall responsibility for this and other money advice services varied from that of this service alone. The local authority manager felt that CAIS Online had made a substantial improvement to the ease of analysing data and obtaining reports.

"There is no action required on my part. I go online and either implement a standard report I've ordered or put the data range and click a button."

Using CAIS Online for this service area across the local authority generates the benefits of consistency enabling effective comparison of data from the different services in the area, together with easy amalgamation of that data to give a local authority-wide picture.

The reporting capabilities of CAIS Online have been expanded at service level, this has also happened at this service's overview level. Whereas there was unlimited access to 'standard' reports, there was a limit to the number of customised ad-hoc reports.

"Had to go to Resolution and pay £500 for the extra report."

It is now easier for a service to create customised ad-hoc reports. This new capability makes it much easier (and costs efficient) for it to respond to specific information requests from fellow officers or elected members. The estimate that in a typical year there was the need for ten ad-hoc reports and that this was the result of a prioritisation which meant that some requests for information through this channel were not met.

"I can create reports at my desk on different permutations of any information, for example someone from the fuel poverty team interested in debt advice and single person households."

The previous arrangements involved local authority 'Performance Monitoring Officers' carrying out a number of tasks to pull together the necessary data – including designing the monitoring form, liaising with all the projects/services, chasing up responses (three times typically!), collating this every quarter and then deciding what to do about missing data (whether to ignore it or whether to spend time and try to resolve it). There was also the concern about the quality of such data at the end of the process.

"Not guaranteed of the robustness of the data – it's just a bit of paper someone has filled in. It's not from the casework management system."

The local authority officer estimated that three quarters of a £40,000 post was spent on such data gathering and management activity and this workload has fallen to the equivalent of a third of a post, with a consequential saving of around £16,000.

The local authority officer agreed this service overview perspective leads to a different view of the CAIS Online system compared to that of a frontline service which has the obligation on data input.

“There’s a difference in perception of the system if you’re a service user or are a manager. Users don’t see the benefit.”

This view was also supported by the opinion that the change from existing working arrangements to one oriented around CAIS Online is not necessarily an easy one.

“Need champions locally to push things forwards. We’ve spent a lot of time over the past two years to get user buy-in into a user group.”

There’s now a CAIS Online user group which comprises about 30 people meeting bi-monthly. The user group started by looking into the CAIS Online system and has now progressed to looking at the data. The local authority drives the user group but membership of it extends beyond this local authority’s geography.

Robustness

One aspect of CAIS Online that seemed to be of value to the team was the missing data reports, which helped encourage the completion of data within case records.

The move to the computer-based MS Access system from the previous paper based system in 2004/5 was seen as a greater step for the organisation than the switch from MS Access to CAIS Online.

“If we went back to paper filing! Electronic is so much easier and so much quicker.”

The ‘missing data’ reporting capability of CAIS Online was praised from the point of view of helping services build as complete a dataset as possible.

“We have a six monthly review into missing data on the system, for example ‘ethnicity’. Some services are better at this than others.”

The point was that missing data undermine the potential effectiveness of the system. Having a robust system for gathering and recording information locally was the lack of a robust system led to a possible under-reporting of the issue. The example was offered on money advice that, according to the Scottish Government’s database, Glasgow had 6,000 cases compared with only 500 reported from Edinburgh.

3.1.2 Ability to use information to link practice to policy and vice versa, in pursuit of best practice

This was currently rated as 7.5 with CAIS Online, compared to a rating of 4 before CAIS Online.

At the service delivery level

The service team recognised the ability of CAIS Online’s client profile information to help with the targeting of work and, with this, the ability to help link operational service delivery to wider strategic priorities. This functionality within CAIS Online was believed by the team to be a recent enhancement to the system.

“It’s just changed, they’ve just been added to the system so now we’re targeting long-term sick, for example.”

Up until this point, the service said it has been difficult to have the insight down to specific groups within the overall population which the (data access permission element of the) CAIS Online system has been modified to provide.

“It’s just we didn’t see the reports, but last June this was added to CAIS Online.”

The service believed these enhancements would help it respond to the emerging community planning agenda, which is seeing a more strategic consideration being applied to many areas... *“there wasn’t a target group or strategy for tackling financial exclusion.”*

The service overview perspective from the local authority officer was that CAIS Online facilitated a connection between policy and practice that previously wasn’t present.

“For example, those with mental health issues across services. We can get baselines, put in place strategies working with intermediaries and then track the affect of policy intervention.”

“Similarly, we can take a policy initiative and see what affect it is having on the group, for example bankruptcy and LILA (low income low assets) cases, looking at the impact of services on people who went down the LILA route to solving debt problems.”

The local authority level

The system was also seen as being able to provide the local authority with evidence for council policy, the example being given of child poverty using indicators from the field and the use of debt advice service to selectively promote other policies.

Despite CAIS Online being beneficial to the link between policy and practice, it was considered there is more work to be done, as the system doesn’t cover all financial inclusion activities or areas – for example, housing services aren’t currently part of the system.

3.1.3 Overall sense of value for money in the way the service is delivered.

This was currently rated as 9 with CAIS Online, compared to a rating of 5.5 before CAIS Online.

The service didn’t feel that the adoption of CAIS Online made much difference in the operation efficiency and value for money and the service gave itself a high mark for its value for money, both pre and post CAIS Online.

“Don’t think this made a difference in the amount of clients we see.”

Where the service did see a difference was in being able to access information. The service described how the web-based capabilities of CAIS Online were helpful in some outreach surgery locations.

“Makes a difference having things in one place and easy to access.”

The service described how it sometimes used data tablets in off-site locations, where they had web connectivity and the type of meeting favoured their use.

“We only take laptops to housing associations, where you have the luxury of a long appointment time – the advisor is there from nine to five.”

The team also recognised the value of CAIS Online in the ability of the administration team to handle an incoming phone call from a client more capably, as a result of the administration team having ready access to the necessary client information.

“They can now answer the call instead of asking the advisor to come away from what they are doing.”

The perspective of the local authority officer was very different and based two factors. First was the segmentation ability afforded by more precise information. Second was the funding arrangements for services pre-CAIS Online. The segmentation approach categorises services’ work into Type 1 (signposting), Type 2 (case work) and Type 3 (representing at court). The intelligence assimilated by systems like CAIS Online has enabled this categorisation to be extended to activity levels and budgets. This makes the funding of services and assessment of value for money a more transparent process. Previously, grants were awarded to frontline services with no sense of outcome focus, which made it harder for a funder to make value for money judgements and to ‘performance manage’ service provision.

The local authority officer’s view was that while the sense of value for money had improved over the past two years...

“...its better now, but its not the whole picture”

... there’s more work to be done. There is a keenness for best practice to be determined as shared across service deliverers. And that is happening partially but not completely.

“We have a page of the system (CAIS Online) which asks the user to confirm they have done these things. We hope they are driving up the quality.”

3.1.4 Ability to contribute to the efficient government agenda

This was currently rated as 8 with CAIS Online, compared to a rating of 1 before CAIS Online.

The service itself felt unable to comment on this aspect, suggesting this line of enquiry was better directed at the local authority funding the service.

The local authority officer agreed that it was difficult for the services themselves to see where the real efficiency advantage comes from, as this is likely to be several levels above service delivery. The officer saw great opportunity for CAIS Online to contribute to the efficient government agenda, by enabling the sharing of services and consequential saving of money.

“CAIS Online does this really well. As a web application, you don’t need software on your PC, all you need is internet access.”

Glasgow City Council already provides hosting of CAIS Online for three local authority areas, with money savings across the three. Linked with this is the high level of risk management within the hosting environment.

“Resolution has its own hosting environment with a reciprocal ‘fail over’ arrangement with Glasgow City Council. This saves Glasgow City Council having to replicate the hosting environment which saves needing to double to cost.”

For partnering local authorities there is the saving on service hosting as well as the saving on the back-up service.

3.1.5 Service efficiency

This was currently rated as 7.5 with CAIS Online, compared to a rating of 6 before CAIS Online.

Those providing frontline services saw an increase in the efficiency of the service following the adoption of CAIS Online. Key to this was the good record keeping that CAIS Online afforded.

“You can always find things.” “Everything that you need – it’s a complete record of the client’s history.”

CAIS Online was seen as user-friendly. The team also praised the ‘task’ capability of CAIS Online...

“You set a task for follow-up”

...saying this helped focus their work on a day to day basis, move cases forward more quickly and, in a busy working environment, help prevent actions being forgotten.

“The minute you go into CAIS you get a list of tasks.”

With the previous MS Access system, there was not this facility and there were lots of what the money advice workers referred to as ‘pendings’ (non-concluded activities).

“There were lots of times you relied on a client to come back to you and if you’re seeing thirty people and you’ve got a massive workload, you don’t remember everything.”

The service providers recognised that the ‘tasks’ function might have created more work for them but they also realise the positive aspect of taking control of moving the client’s case forward.

“Before that (CAIS Online) I used to set it in my diary, but this saves me having to run two systems to keep on top of the urgents.”

There was also the view that CAIS Online has proven more robust in use than the previous MS Access-based system.

“Oh yes, definitely, it wasn’t that great anyway, it kept breaking down.”

Some frontline workers also commented on the paper-based system that preceded the MS Access solution. People spoke about *“physically hunting for files”* and the office having *“loads and loads of filing cabinets.”* The theme of the conversation was that, from the service’s perspective, the major transition was the move away from paper-based filing rather than the move from MS Access to CAIS Online. People didn’t view CAIS Online as perfect. It was criticised for being slow if there were many users at the same time...

“If there’s a lot of people on the system it can slow you down.”

...and also slower if staff are working remotely and subject to lower internet access speeds than they might enjoy at the main office.

Money advice workers also drew attention to what they viewed as the frustrating characteristic of CAIS Online of logging people out of the system part-way through a matter, when the worker might be away from their desk interviewing a client.⁵

⁵ The ‘timed-out’ feature of CAIS Online is present to support data security. The essence of this is to shut down access to the system automatically, if the system hasn’t been used by the

“If you’re down seeing a client and you leave your desk and interview a client... if you’ve been kicked out and you’re part way through and you haven’t saved your work, CAIS doesn’t take you back to where you were working.”

“Don’t see the point why there’s a timescale on it (automatically logging people out of the system, if inactive) if you are away interviewing clients.”

The team also pointed out it was difficult to change data once the CAIS Online database had been updated.

“If you’ve made a mistake, you can’t delete it once you’ve updated it.”

The comment applied to input mistakes, as referred to above, but also changes in a client’s partners.

“Need to get the system admin (the CAIS Online developers) to do it (make the changes to the data).”

The frontline money advice workers understood why it might be necessary for CAIS Online to have a degree of protection from data changes.⁶

3.1.6 Ease of report writing and service administration

This was currently rated as 9 with CAIS Online, compared to a rating of 5 before CAIS Online.

The service has three people in an admin support role and these work in conjunction with the money advice staff. This role helps take some of the service administration burden off frontline workers.

It should be noted that hand written notes which are entered into the case management system later seems to be the norm within this service area. This is mainly for the benefit of helping clients feel at ease...

“... trying to make it as less formal as possible, maybe more comfortable for them and comfortable for you”

...with the view that conducting an interview while entering data onto a laptop whose screen is not in view of the client is not creating such an environment.

There was also the view that some parts of this work are very ‘paper’ dependent, with forms not available electronically and also requiring genuine signatures.

3.1.7 Ease of carrying out home visit meetings

This was currently rated as 10 with CAIS Online, compared to a rating of 10 before CAIS Online.

The high scores given against this factor both pre-CAIS Online and also with CAIS Online installed result from the way that interviews in clients’ homes are conducted.

logged-on user for a period of time – a situation in which it might be reasonably expected the user was away from his/her computer terminal and therefore access to the CAIS Online data unprotected.

⁶ Restrictions on the ease with which some data may be changed, once entered, are a deliberate feature of the CAIS Online system and designed to preserve the data audit trail.

The point was made above about the use of laptops in an interview not being conducive to maintaining eye contact...

"I find it distracting, I feel I'm not giving them [clients] individual attention."

...making the client feel at ease and keeping the interview time as short as possible without compromising on data quality.

"Too much pressure to type well when they're [clients] sitting there."

This means that CAIS Online, or for that matter any other computer-based solution available, is not going to offer perceived benefits for home visit working. The service believed it administers and runs home visits in an optimal manner.

"Think it would take longer (using a laptop)"

"There's always something to sign."

3.1.8 Ease of outreach work in community premises

This was currently rated as 9 with CAIS Online, compared to a rating of 8 before CAIS Online.

Similar arguments were made about the challenges of working with laptops in client meetings as were made above, applying also to outreach work in community premises.

In some outreach locations, for example housing associations, an appointments system is run so the worker knows who they will be meeting in advance. In this context having the client data available through CAIS Online is a recognised benefit in preparing for that meeting. It is in this context that CAIS Online was seen to facilitate better outreach working in community premises than the previous arrangements.

"You can look up on the system and see what's happening with the client."

"It's just so much easier to flick through CAIS Online."

This is not necessarily leading to a situation where the service is able to increase its throughput of clients (that is largely dictated by the appointments system) but it should lead to more productive discussions in outreach settings.

If the outreach service is a 'drop-in', which means the money advice worker doesn't know who they will be seeing until the person walks in the room, the ability to carry out specific preparation for the discussion using CAIS Online data is nullified. The exception to this is the potential situation when there is a follow-up meeting at an outreach location.

"It might have been someone who came initially to one of our health centres."

3.1.9 Ability to access up to date case information

This was currently rated as 8.5 with CAIS Online, compared to a rating of 6 before CAIS Online.

CAIS Online was considered to have made a strong contribution in this regard, for the reasons discussed earlier, provided the information is up to date.. An administrative

back-log can prevent the most up to date information being available through CAIS Online.

“Fine, providing everything is up to date.”

The task system on CAIS Online, as previously described, was viewed as very helpful in helping ensure the service had completed the operational tasks to help generate up to date case information. And it was this aspect of the system, and the fact that CAIS Online holds more comprehensive data, which seemed to distinguish it from the previous MS Access approach.

3.1.10 Ability to work on multiple case types

This was currently rated as 8.5 with CAIS Online, compared to a rating of 8 before CAIS Online.

This was a difficult line of enquiry for the team to respond to as the service hadn't wholly experienced the use of CAIS Online on issues beyond money advice. Whilst it is true that the service does handle many situations where a client has more than money advice or debt issue...

“it attaches a case record to a client i.d.”

...the main potential for multiple case types may well be around different services areas (for example welfare benefits). The slight advantage, in the opinion of the people interviewed, of the CAIS Online approach over and above two distinct databases, was the sharing of client profile information across the two service areas.

Some workers had experienced the multi-case situation with CAIS Online and spoke very positively about its capabilities.

“As soon as you log in it will tell you if they're multiple issues.”

3.2 Service B

Service B provides welfare benefits services. It is part of the Social Work Services function within a local authority⁷. Services are provided by a team of nine people in two client facing roles. There is no specific administration support and the client facing team carries out its own record keeping and client administration.

Over the past twelve months the team has dealt with 16,035 enquiries from 12,343 individuals. Most of the enquiries are by phone or email (the service also provides advice to colleagues within the local authority) although the team also conducted 1,225 meetings or home visits with clients. The services are delivered from three different offices. The cost of providing the service is about £335,000 per annum.

Currently client records are kept on a manual system with hard copy files. The team is organised on a task basis, which means that specific roles in the welfare benefits process (for example, appeals) are designated to specific team members.

The strategy canvas shows the perceived performance of the service in relation to (in this case 10) selected factors, shown on the horizontal axis. The vertical axis is a 1 to 10 scale of performance, where 1 is low and 10 is high. The main role of a strategy canvas is to give the overall perspective on a service in a concise manner – the performance ratings for each of the factors are supported by qualitative and quantitative data, as appropriate.

⁷ The organisation serves a population of 151,000 people over an area of 23,000 hectares.

In this context, we looked at two main stakeholder groups – ‘policy/management’ level and ‘frontline’. Factors relevant to each of these groups in the evaluation were as follows.

Policy/management

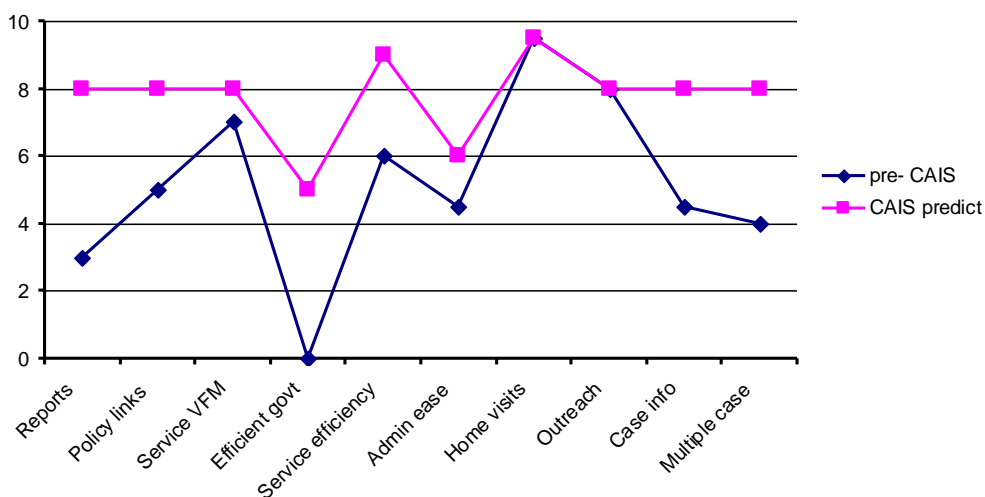
- Ease of data analysis and obtaining management reports
- Ability to use information to link practice to policy and vice versa, in pursuit of best practice
- Overall sense of value for money in the way the service is delivered
- Ability of service to contribute to the ‘efficient government’ agenda

Frontline

- Service efficiency, the number of cases that can be dealt with over a given time period
- Ease of report writing and administration
- Ease of home visit working with clients
- Ease of outreach work with clients from community-based locations
- Ability to access up to date case information
- Ability to capably work on multiple case types

The overview of this service, based on information gathered to date is as follows. This shows the service in its current ‘pre-CAIS Online’ form and how the service predicts it will perform when it is fully operational with CAIS Online.

Service B (CAIS Online to be installed)



The data and perspectives which underpin these ratings are as follows.

3.2.1 Ease of data analysis and obtaining reports

This was currently rated 3, with an expectation that CAIS Online will lift the score to 8.

At the moment, data are manually collated by each team member and submitted monthly to the service manager on a MS Excel spreadsheet. Thereafter, the manager cuts and pastes the information into a matrix. The resultant analysis readily shows month and year to date performance for the service as whole, the two teams in the service and at an individual level, for the metrics around which data are gathered.

The process is reliant on staff sending information promptly and with the huge demand on the service, the production of statistics can take a back seat.

“It’s not uncommon for me to be late.”

The service manager's current estimate of staff time to prepare the information is five minutes for each of the ten staff to pull together the data and twenty minutes for the service manager purely to input the submissions into a spreadsheet. This is carried out once a month in performance reporting to senior management and there are three or four ad hoc requests for additional information in a typical year from senior management.

If the scope of the current information and analysis is limited, the expectation is that with CAIS Online, there will be more detail available, enabling the fine tuning of services in different geographical areas and around specific benefit types.

"I really envisage this being much easier and more detailed."

The service manager estimates that his team spends about 22 hours (in total) on administration each week.

"We've got very expensive admin."

3.2.2 Ability to use information to link practice to policy and vice versa, in pursuit of best practice

This was currently rated as 5, with the expectation of 8 being possible with CAIS Online.

At the moment, the service has the capability to use insight from the data to influence practice.

"Break down data into twelve or thirteen (geographical) areas and record major benefits – with the intention to liaise with the Citizens' Advice Bureau for profiling, for targeting resources and campaign work."

But this capability is not being realised.

"Technically speaking, we can do this to a limited extent but we haven't done so. Why? A lack of ownership, lack of will and all being busy anyway."

The service manager is asked for information on benefits uptake for feeding up the way in the organisation, for comparison with other services.

"That has been very time consuming. One piece of information took me all morning to create. With CAIS they would have easily been done."

3.2.3 Overall sense of value for money in the way the service is delivered

This was currently rated as 7, with the expectation of 8 being possible with CAIS Online.

Currently the service is seen as generating very good value for money, on the strength of its effectiveness. The cost of the service is known (£335k), also the cost of handling an enquiry (£20.89) and last year the service generated benefit gains of £6.5million. This performance was the result of a monthly service resource of 320 person-hours.

"In addition we still managed to provide thirty training events with more than 170 people in attendance."

CAIS Online was seen as helping the service further improve, once the CAIS system is established, this further improvement being seen as coming from the more efficient use of staff time and targeting.

"Not everything we do (people seen) gets a monetary gain – with CAIS I think we could."

3.2.4 Ability of service to contribute to the 'efficient government' agenda

This was currently rated as 0, with the expectation of 5 being possible with CAIS Online.

The service's view was that, at present, the contribution to the efficient government agenda doesn't consist at all.

"We're so paper reliant. Manually recording information and cases."

CAIS was predicted to make a "huge difference" in this respect, both through more efficient internal working

"Crazy things – with staff in (the other location), I've had to drive to (the other location) to get the file."

The hope is also that the organisation can get buy-in to CAIS Online from other agencies, to enable more seamless communication of data/insight.

3.2.5 Service efficiency

This was currently rated as 6 with the expectation of 9 being possible with CAIS Online.

The service saw itself as fundamentally efficient.

"We meet our targets."

Overall, CAIS Online was seen as helping the service further improve.

The main current issue around service efficiency was felt to be around the location of the paper case files.

"There's a wee bit of investigation to find out who's got it."

This is exacerbated by the service being delivered across various locations and the file tracking system that has been created, not being adhered to.

"It's ridiculous it doesn't work" "Lots of people forget."

Some of the team estimated they spent around 20% of the working day in trying to find files.

A legacy of having better access to data, people thought that the main improvement in efficiency would come from being able to respond to and meet clients more quickly than is currently the case. People were cautious about CAIS Online's ability to enable the service to reach 10 out of 10 in this respect.

"Should hopefully move up to a 9 out of 10".

People thought there would be some teething problems initially and they also recognised it would take time for the new database to become fully populated.

“It could take a further year of inputting.”

People also commented the value of the system was very dependent on people’s ability to input data accurately.

“Misspelling names and entering the correct date of birth.”

Nor did people see that an entirely electronic solution was possible for the service.

“We are always going to need paper files, because of the appeals.”

3.2.6 Ease of report writing and service administration

This was currently rated as 4.5 with the expectation of 6 being possible with CAIS Online.

The current arrangements are for the frontline service deliverers to carry out their own administration.

“We do everything ourselves”.

There was quite a large variance in terms of how team members regarded this issue, a key determinant appeared to be the relative ownership of the current system.

“The first people in the post were given a very free reign in designing the approach, even down to the tables and spreadsheet.”

As such, some people felt a greater allegiance to the present processes than others.

The main challenge to the efficacy of the current approach given by some people was finding the time to record the data.

“You’ve got so much data to record.”

People however recognised the shortcomings of the current system which, while encouraging the recording of data in hard copy form, appeared light on its reporting demands.

“We’ll record something on our sheets, but not put it as a stat.”

There were also concerns about the degree to which recording was consistent.

“People interpret it in different ways”

People also admitted that, despite best attempts, they doubted their monthly reports were totally accurate (usually an under-estimation).

Additionally, the legibility of handwriting was an impediment

“Some people’s hand writing is not legible at all”

.... as was the use of abbreviations.

“Texting is having an impact”.

With regard to the future, people thought that while CAIS Online might improve the situation, time would still need to be devoted to data inputting and administration, and the quality of information would still be dependent on the quality of inputting, *“still got to type.”*

People also had concerns that CAIS' facility for standardised letters could lead to *“a little duplication”*.

There was also the view that a high degree of hand written work is likely to remain, as a legacy of the forms required by government departments such as the Department of Work and Pensions.

“We're very writing oriented, the disability benefit form is fifty pages long.”

Some people were concerned that scanning hard copy forms into CAIS could be time consuming.

3.2.7 Ease of carrying out home visit meetings

This was currently rated as 9.5 with the expectation of 9.5 being maintained with CAIS Online.

The team spoke very positively about the current arrangements for carrying out meetings in the client's home.

“Easy just to lift a paper file and take it out”.

The point was made that home visits are pre-planned, so the necessary information to take to a meeting for a meeting is likely to be identifiable in advance.

In respect of the move to CAIS Online, people didn't feel that the current situation would be further improved by CAIS, as people didn't see a change to home visit practice. Fundamentally, this meant not using laptops on home visits. There were several reasons for this.

“It's rude to use a laptop in front of people.”

“Not all the places we're going to are going to have Wifi.”

“It's fine if you're going to sit at someone's table, but a lot (of clients) don't have tables. Some don't have chairs.”

People spoke about the length of time that some appointments currently take and they're concerns about making it longer.

“Our appointments are very lengthy (2 hours) and clients get tired.”

“I wouldn't want to be faffing around in a client's house.”

The strength of the current approach is that it provides flexibility and client centredness.

“You've got to really tailor your visits to the client.”

“Often they tell you something at the end of the discussion that relates to a place earlier, so you've got to go back.”

“We still want to come back and check the form back at the office.”

“They [clients] are going to give you information relating to other benefits and you have to write it down to bring it back to the office.”

CAIS was not seen as adding any extra capability to this area of work, given current working practice.

3.2.8 Ease of outreach work in community premises

This was currently rated as 8 with the expectation of 8 being achieved with CAIS Online.

The team made the point that most outreach work in community premises, such as other council venues is scheduled in advance and the necessary paperwork for the meeting is prepared in advance. The exception to this is when drop-in surgeries are run. The team’s current view is that drop-in work involves giving *“basic generic benefits advice”* and access to individual client records (as might be facilitated to CAIS Online) is unlikely to be particularly beneficial.

“I can’t see CAIS Online really affecting that”.

People also raised concerns about the security of internet-based file access when working remotely⁸.

“Someone else could hack in – national insurance numbers, names, post codes...”

3.2.9 Ability to access up to date case information

This was currently rated as 4.5 with the expectation of 8 being achieved with CAIS Online.

Peoples’ views of how capable the service was in this regard varied, but the over-riding sentiment was that CAIS Online should be able to improve the service’s way of working....

“CAIS will really improve things”

.... providing people are diligent about updating the system.

“It could make such a huge impact.”

The point has been made earlier about the challenges sometimes experienced in around being able to locate the paper file.

“How many times do we see this as just a waste of time.”

3.2.10 Ability to work on multiple case situations

This was currently rated as 4 with the expectation of 8 being achieved with CAIS Online.

People discussed the degree to which they thought that CAIS Online could help avoid duplication in information gathering

“There a lot of overlap cases”

⁸ It should be noted that there have been prominent examples of paper files being subject to theft or accidental loss. All data on the CAIS Online system is encrypted and transferred immediately to a remote server.

"I've got several on my desk that I've been on"

.... and people thought this would potentially be high. It would help with building up more comprehensive pictures of clients' situations

"Will help us to see the bigger picture"

.... and help make the team better informed when they see clients

"Less fumbling in the dark."

The potential of CAIS Online was tempered by members of other teams (for example pensions and housing) not using CAIS Online.

4 Conclusions

The conclusions from this study are presented in relation to three key questions of interest to service decision makers, in their consideration of CAIS Online.

- Can I provide a better service?
- Can I save money?
- Can I make a better policy?

4.1 Can I provide a better service?

- Nine out of ten factors investigated showed improved performance whether moving from paper-based or pc-based systems. The previously perceived worst performing areas showed the greatest improvement.
- The main operational benefits of CAIS Online were the ability of frontline staff to have ready access to data and the ability to devote more time to client matters by having administrative time freed up.
- The service benefits offered by CAIS Online were presented in an environment which ensured system continuity, high levels of data security and cohesive system updating and development with significant user input via the CAIS Online user group which is operated by Resolution Case Management.
- The capability of CAIS Online for remote working (for example home visits or outreach work) is not yet a strong realisable benefit. This is a result of laptop computers not currently being seen as a useful part to a client/adviser dialogue. However, as the use of computer technology in a client meeting becomes more accepted and widespread, as is predicted, CAIS Online's service benefits become even greater.

4.2 Can I save money?

- CAIS Online was seen in the investigation as being able to make a strong contribution to the 'efficient government agenda'.
- The savings for a local authority result from not needing to provide hosting for the CAIS Online system (this is already provided by Glasgow City Council), the time saving for local authority Monitoring Officers in expediting, collating and presenting reports about service performance, cost saving through not needing to make an additional investment in system continuity assurance (failover) and disaster recovery – which is already provided by CAIS Online to Glasgow City Council and other clients⁹.
- At a service agency level (for example, a money advice service) a service with ten frontline workers can expect an annual time saving equating to around £12,000). The sum of these savings is far in excess of the user access fee for CAIS Online for a service and local authority area (£350 per service user).

⁹ Glasgow City Council owns the CAIS Online system and makes a licence available to other local authorities at no cost, giving free of charge access to other users.

Saving	Saving amount (annual)
Hosting the CAIS Online system (provided by Glasgow City Council)	£20,000
Saving on local authority Monitoring Officer's time	£40,000
CAIS Online failover and disaster recovery capability (already in place)	£5,000
Staff time saving at an agency level £12,000 per agency	£120,000
(CAIS Online access fee of £3,500 for an agency with 10 workers)	(£35,000)
Annual saving for a local authority	£150,000

- The annual saving for a local authority with ten of its services using CAIS Online and ten workers in each of the services, was estimated at **£150,000**
- When extrapolated across Scotland, should all Scottish local authorities adopt CAIS Online this could lead to a potential annual saving for Scotland of just under **£5,000,000**.¹⁰

4.3 Can I make better policy?

- The benefits of CAIS Online were particularly strong at the management level. This meant a greater ability to use the empirical data from service provision to inform policy development and also a greater ability to cascade the implications of policies and policy changes to service delivery.
- Managerial strengths of CAIS Online were around data analysis and report production, together with data quality. Having the benefit of more accurate and more comprehensive data from services means the quality of insight used to inform policy from services is raised.
- CAIS Online also facilitates the easy amalgamation of data from a range of services, which meant policy recommendations could be more readily grounded in the data from across a service portfolio.

¹⁰ This figure is based on the assumption that each local authority has ten services operating CAIS Online and, within these, each service has 10 workers using the system. The figure doesn't take account of any scale related discounts that Resolution Case Management could offer local authorities on user licenses.

Appendices

Appendix 1	Policy level questionnaire – Service A
Appendix 2	Policy level questionnaire – Service B
Appendix 3	Service delivery questionnaire
Appendix 4	Service delivery topic guide – Service A
Appendix 5	Service delivery topic guide – Service B

Appendix 1 Policy level questionnaire – Service A

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Questionnaire

Policy/Management level, Service A – Money Advice

1 Ease of data analysis and obtaining management reports

On a scale from 1 to 10, where 1 is 'really easy' and 10 is 'really difficult', how easy is it to carry out analysis on casework data and produce management reports?

What are the reasons behind the mark you've awarded?

What evidence/numerical data is there to underpin this view (time spent per analysis, number of reports produced per month)?

To what degree has this improved since using CAIS (old rating, and explanation)?

2 Ability to use information to link practice to policy and vice versa, in pursuit of best practice

On a scale from 1 to 10, where 1 is 'never' and 10 is 'to a great degree', to what degree do you use information to link practice to policy and vice versa, in pursuit of best practice?

What are the reasons behind the mark you've awarded?

What evidence/numerical data is there to underpin this view (changes to practice made over a year, recommendation to policy made over a current year)?

To what degree has this improved since using CAIS (old rating, and explanation)?

3 Overall sense of value for money in the way the service is delivered

On a scale from 1 to 10, where 1 is 'very poor' and 10 is 'excellent', what is your overall sense of value for money in the way the service is delivered?

What are the reasons behind the mark you've awarded?

What evidence/numerical data is there to underpin this view (number of clients dealt with per year, number of client discussions per year, divided by the cost of running the service)?

To what degree has this improved since using CAIS (old rating, and explanation)?

4 Ability of service to contribute to the 'efficient government' agenda

On a scale from 1 to 10, where 1 is 'to a low degree' and 10 is 'to a high degree', what is the current ability of service to contribute to the 'efficient government' agenda?

What are the reasons behind the mark you've awarded?

What evidence/numerical data is there to underpin this view (degree of compliance with efficient government expectations)?

To what degree has this improved since using CAIS (old rating, and explanation)?

Appendix 2 Policy level questionnaire – Service B

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Questionnaire

Policy/Management level, Service B – Welfare Rights

1 Ease of data analysis and obtaining management reports

On a scale from 1 to 10, where 1 is 'really easy' and 10 is 'really difficult', how easy is it to carry out analysis on casework data and produce management reports?

What are the reasons behind the mark you've awarded?

What evidence/numerical data is there to underpin this view (time spent per analysis, number of reports produced per month)?

How do you expect this to change with the CAIS system? (new rating, and explanation)

2 Ability to use information to link practice to policy and vice versa, in pursuit of best practice

On a scale from 1 to 10, where 1 is 'never' and 10 is 'to a great degree', to what degree do you use information to link practice to policy and vice versa, in pursuit of best practice?

What are the reasons behind the mark you've awarded?

What evidence/numerical data is there to underpin this view (changes to practice made over a year, recommendation to policy made over a current year)?

How do you expect this to change with the CAIS system? (new rating, and explanation)

3 Overall sense of value for money in the way the service is delivered

On a scale from 1 to 10, where 1 is 'very poor' and 10 is 'excellent', what is your overall sense of value for money in the way the service is delivered?

What are the reasons behind the mark you've awarded?

What evidence/numerical data is there to underpin this view (number of clients dealt with per year, number of client discussions per year, divided by the cost of running the service)?

How do you expect this to change with the CAIS system? (new rating, and explanation)

4 Ability of service to contribute to the 'efficient government' agenda

On a scale from 1 to 10, where 1 is 'to a low degree' and 10 is 'to a high degree, what is the current ability of service to contribute to the 'efficient government' agenda?

What are the reasons behind the mark you've awarded?

What evidence/numerical data is there to underpin this view (degree of compliance with efficient government expectations)?

How do you expect this to change with the CAIS system? (new rating, and explanation)

Appendix 3 Service delivery questionnaire

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Questionnaire

Service delivery level – frontline team members

1 Service efficiency

On a scale from 1 to 10, where 1 is 'very inefficient' and 10 is 'very efficient', how efficient do you think the delivery of the service is at the moment?

2 Ease of report writing and service administration

On a scale from 1 to 10, where 1 is 'very difficult' and 10 is 'very easy', how easy is it to write reports and carry out the record keeping administrative tasks associated with the service?

3 Ease of carrying out home visit meetings

On a scale from 1 to 10, where 1 is 'very difficult' and 10 is 'very easy', how easy is it to carry out and administer meetings in the client's home?

4 Ease of outreach work in community premises

On a scale from 1 to 10, where 1 is 'very difficult' and 10 is 'very easy', how easy is it to carry out and administer meetings on an outreach basis in community venues?

5 Ability to access up to date case information

On a scale from 1 to 10, where 1 is 'very low' and 10 is 'very high', what is the ability to access up to date and comprehensive client information/records prior to a meeting?

6 Ability to work capably on multiple case situations

On a scale from 1 to 10, where 1 is 'very low' and 10 is 'very high', what is the ability of the service to work with 'multiple case' clients without needing to duplicate information?

Appendix 4 Service delivery topic guide – Service A

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FMR topic guide

Service delivery level (frontline team members) – Service A

1 Service efficiency

What are the reasons behind the mark you've awarded?

What evidence/numerical data is there to underpin this view (client meetings per month)?

To what degree has this improved since using CAIS?

2 Ease of report writing and service administration

What are the reasons behind the mark you've awarded?

What evidence/numerical data is there to underpin this view (time spent per week writing reports)?

To what degree has this improved since using CAIS?

3 Ease of carrying out home visit meetings

What are the reasons behind the mark you've awarded?

What evidence/numerical data is there to underpin this view (proportion of client meetings that are home visits)?

To what degree has this improved since using CAIS?

4 Ease of outreach work in community premises

What are the reasons behind the mark you've awarded?

What evidence/numerical data is there to underpin this view (proportion of client meetings that are in outreach community venues)?

To what degree has this improved since using CAIS?

5 Ability to access up to date case information

What are the reasons behind the mark you've awarded?

What evidence/numerical data is there to underpin this view)?

To what degree has this improved since using CAIS?

6 Ability to work capably on multiple case situations

What are the reasons behind the mark you've awarded?

What evidence/numerical data is there to underpin this view?

To what degree has this improved since using CAIS?

Appendix 5 Service delivery topic guide – Service B

3080 - EVALUATION OF CAIS

FMR topic guide

Service delivery level (frontline team members) – Service B

1 Service efficiency

What are the reasons behind the mark you've awarded?

What evidence/numerical data is there to underpin this view (client meetings per month)?

How do expect this to change when you use CAIS?

2 Ease of report writing and service administration

What are the reasons behind the mark you've awarded?

What evidence/numerical data is there to underpin this view (time spent per week writing reports)?

How do expect this to change when you use CAIS?

3 Ease of carrying out home visit meetings

What are the reasons behind the mark you've awarded?

What evidence/numerical data is there to underpin this view (proportion of client meetings that are home visits)?

How do expect this to change when you use CAIS?

4 Ease of outreach work in community premises

What are the reasons behind the mark you've awarded?

What evidence/numerical data is there to underpin this view (proportion of client meetings that are in outreach community venues)?

How do expect this to change when you use CAIS?

5 Ability to access up to date case information

What are the reasons behind the mark you've awarded?

What evidence/numerical data is there to underpin this view)?

How do expect this to change when you use CAIS?

6 Ability to work capably on multiple case situations

What are the reasons behind the mark you've awarded?

What evidence/numerical data is there to underpin this view?

How do expect this to change when you use CAIS?