



CASE STUDY: FORMULATE FOR ADULT SOCIAL CARE

## Implementing Formulate at Rochdale Metropolitan Borough Council

The government's agenda outlined in Putting People First led Rochdale to selecting Imosphere as the most appropriate provider to work alongside them in developing and implementing Formulate.

Prior to this, the default approach was to allocate 'traditional' care packages to meet needs, meaning choice and control was limited and variation in spend for the same needs (both within and across different care groups) was difficult to monitor and control.

### Introduction of the tool

The introduction of Formulate was identified as a way of attempting to achieve parity between provisions and aligning costs, so there would be more equality for service users when they determine what to spend their personal budget on, regardless of whether this is through a managed or a cash budget.

### Roll-out

The work began in Older People's services, with Formulate being rolled-out in late 2010. This proved to be both robust and very accurate, with actual budgets allocated being the same or very close to indicative budgets in the vast majority of cases.

Following this success, Rochdale chose to widen the scope of Formulate to encompass all service user groups and to build new personalisation processes around this.

This included fully embedding the FACE assessment tools and Formulate within their social care system, meaning practitioners could benefit from needs, outcomes and an instant indicative budget calculation all being triggered from a single assessment.

### Steering Group Formation

A steering group was formed in September 2011, with a brief to develop a universal solution which delivers significant efficiencies whilst streamlining personalisation processes to high quality local service delivery.



Organisation: Rochdale Metropolitan Borough Council  
Product: Formulate

“We see Imosphere very much as a partner rather than a supplier. Their expertise on resource allocation and assessment has proved to be key in helping us to implement personalisation the right way.”

Service Director  
Adult Care  
Rochdale Metropolitan Borough Council

The steering group had representation from information systems, strategic commissioning, finance, care management and Imosphere, and is chaired by the Service Director. Working groups were formed to address operational implementation and assessment practice issues, to ensure staff at all levels would be on board with the culture changes that accompany personalisation.

By encouraging a culture of boldness towards change, ensuring buy-in to the project from the top down, deploying strategies to stimulate growth and diversity in the local market, and communicating clearly and effectively at all levels, the group was able to meet its target of successfully developing and implementing Formulate universally and the associated new processes in April 2012.

## Clear Communication

Clear and regular communication, both within the organisation and to service users and families, has been essential to the project's success. This has included production of new materials relating to personalisation, personal budgets and Rochdale's fairer contribution policy.

## Market Strategies

When determining financial rates for Formulate, the importance of developing parallel strategies to influence the local market was kept at the forefront, ensuring it would provide realistic and workable budgets. Rochdale's steering group created a Market Development sub-group to focus on this essential area.



As Director, I used the FACE assessment and Formulate myself with a member of the public and his family. Guidance notes are important for consistency, as is the clear understanding of the importance of noting family, friends and community contributions, carefully managed in this system.

This has helped Rochdale to be consistent and equitable in the allocation of Personal Budgets. We are confident this is the case and I would recommend this way of working to others.

Executive Director  
Adult Social Services  
Rochdale Metropolitan Borough Council

## The Results

- Indications since 'go live' show projected efficiencies are being kept on track through use of Formulate, which is proving to be highly accurate in predicting costs.
- Formulate has encouraged practitioners to focus on identifying all informal support that is available and start to move away from a dependency model and towards greater empowerment.
- There is a feeling that personalisation is really succeeding locally – a considerable set of achievements within a difficult financial climate.

For more information about Formulate or to book a demo, go to [www.imosphere.com/formulate](http://www.imosphere.com/formulate)