GUIDE TO USING THE IMPROVEMENT CYCLE MEETING DOCUMENT

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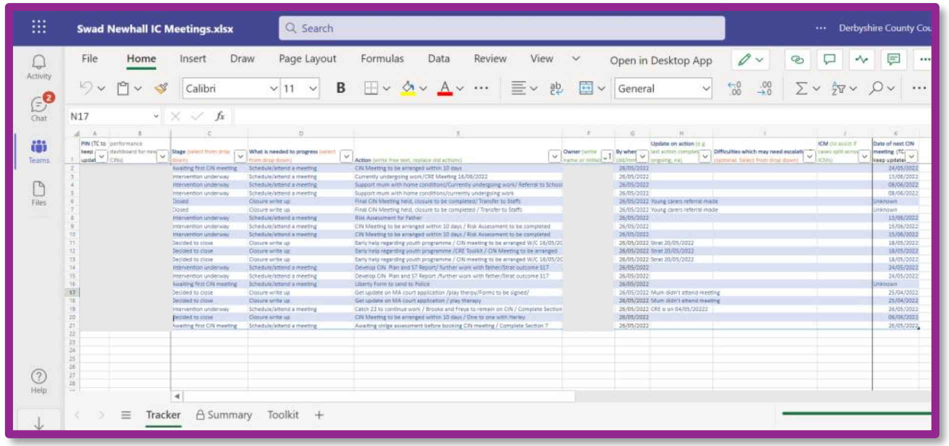
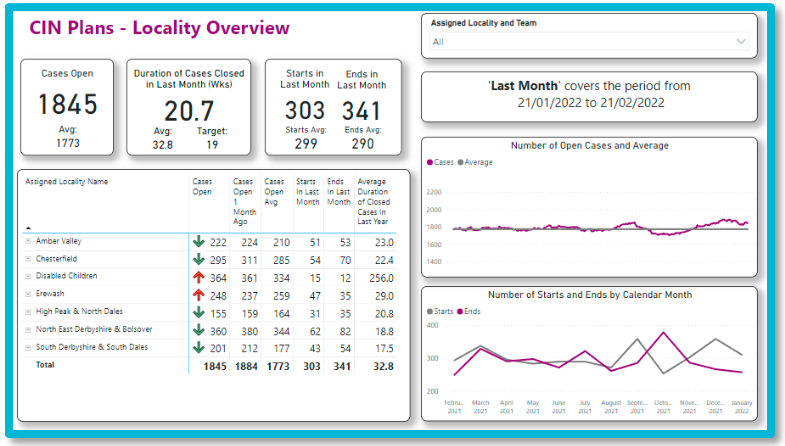
ICM DOCUMENT: OVERVIEW

From Jan 2022, Improvement Cycle Meetings (ICMs) were introduced within teams to enable better tracking, prioritisation and progression of CIN plans. The team manager, practice supervisor and practitioners meet weekly for a short (up to 30 min) review of actions to ensure CIN plans progress in a timely, effective way. There is opportunity for practitioners to share knowledge and managers to support and unblock challenges.

Tools to aid ICM:

1. **ICM document** Action tracking table. Details on the *following pages*
2. **PowerBI dashboard** showing cases open, durations & sign off dates. Details in a *separate document*.



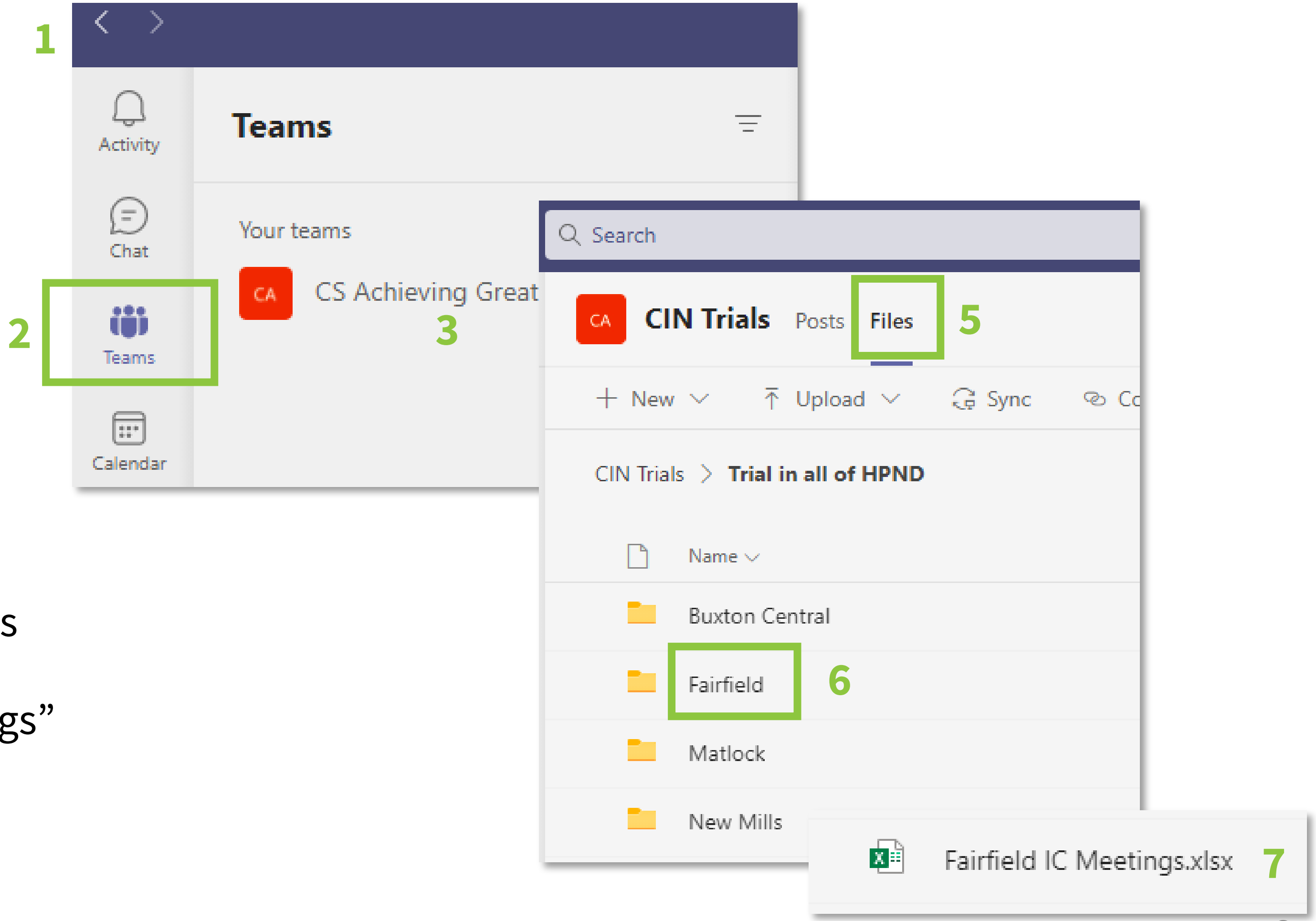


WHERE TO FIND THE ICM DOCUMENT

The ICM document is stored on Derbyshire's SharePoint. It's a live document that autosaves and multiple people can edit at once. You will find it on Teams, in a channel set up specifically for your locality's ICM documents.

To find it:

1. Open Teams.
2. Click the "Teams" button on the left-hand panel
3. Click the CS Achieving Great Futures team
4. Choose the channel "CIN [locality]"
5. Click "Files" at the top of the screen
6. You will see folders for each team. Navigate to yours
7. Click the document called "[Team Name] IC Meetings"

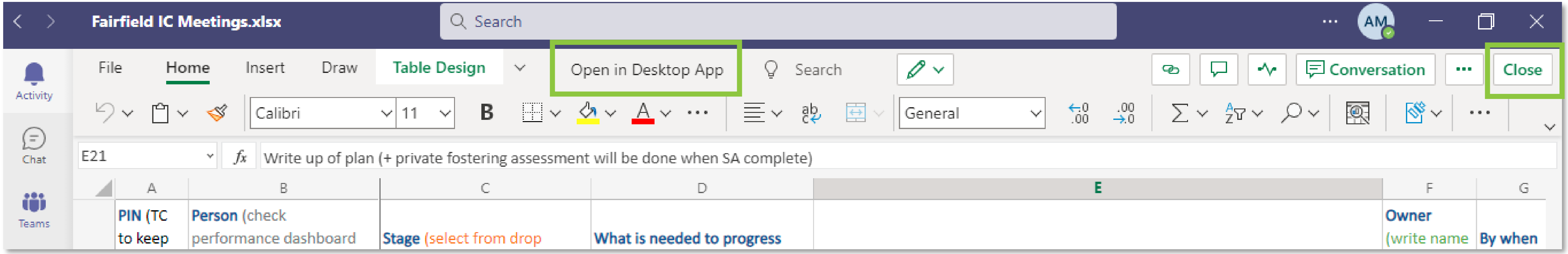


USING THE ICM DOCUMENT

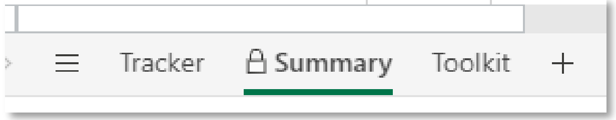
To use it:

1. You can work on it within Teams OR you can open it in excel by clicking “Open in Desktop App”

2. When finished, you can click “Close” on the top right (or close the excel window if working in excel). It saves automatically. If you want to save an offline copy onto your computer e.g. to email to SWs, click File > Save As > Download A Copy.



3. There are 3 tabs at the bottom of the screen. “Tracker” is the one you’ll use most, as it’s the table that is updated weekly. “Summary” shows you a visual summary of your open cases and is based on the information in the tracker table. “Toolkit” contains ideas of ways you can help SWs to progress a case.



ICM DOCUMENT: TRACKER TAB

Tracker | Summary | Toolkit | +

DERBYSHIRE County Council

The tracker tab is filled in by PS/TM (sometimes with support from the team coordinator) during the meeting, and is a table:

PIN (TC to keep updated)	**Person** (check performance dashboard for new CINs)	**Stage** (select from drop down)	**What is needed to progress** (select from drop down)	**Action** (write free text, replace old actions)	**Owner** (write name or initials)	**By when** (dd/mm/yy)	**Update on action** (e.g. last action completed)	**Difficulties which may need escalation?** (optional. Select from drop down)	**Date of next CIN meeting** (TC to keep updated)
000001	Al Example	Intervention underway	Write up	Complete risk assessment	JB	20/01/22	Last action completed		30/01/22
000002	Ed Test	Decided to close	Schedule/attend a meeting	Meet with hospital re: possible home discharge	AN	15/01/22	Date extended by 1 week		02/02/22

Rows are deleted when cases are closed, new ones added when cases appear on the performance dashboard

Click on cell to see options: Awaiting first CIN meeting; Intervention underway; Identified for potential closure; Decided to close; Closed

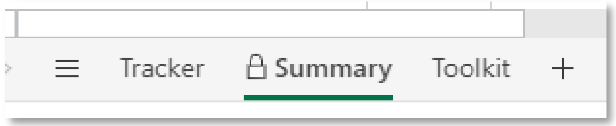
New action written straight over the previous one – it's a working document

Specific date set for action so it can be reviewed at the meeting after

TM/PS may want to collect data for potential escalation to HoS e.g. # plans with difficulty stepping down to EH, so can record here if desired.

Arrows on column headings allow ordering or filtering of the entries if desired

SUMMARY TAB OF ICM DOCUMENT

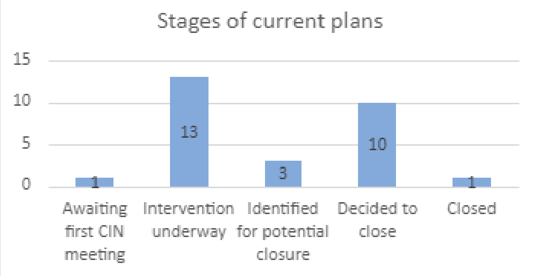


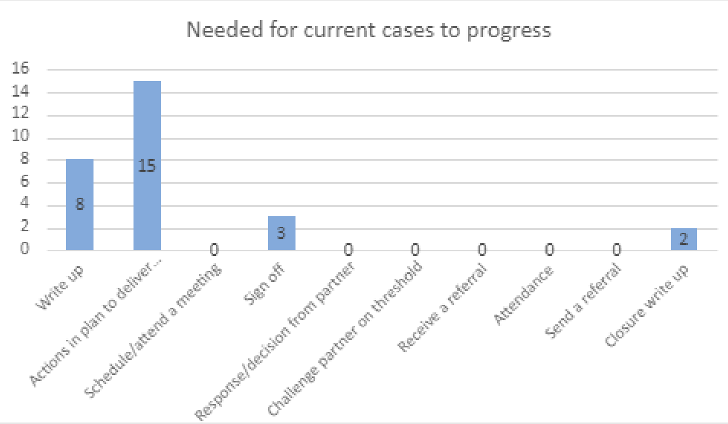
DERBYSHIRE County Council

- There are 3 tabs at the bottom of the screen. “Tracker” is the one you’ll use most, as it’s the table that is updated weekly. “Summary” shows you a visual summary of your open cases and is based on the information in the tracker table.
- The summary tab is particularly useful for spotting patterns and summarising information for managers. Heads of service are likely to ask about expected closures during Locality CIN Check-Ins in performance meetings.

Plan stages	Number
Awaiting first CIN meeting	1
Intervention underway	13
Identified for potential closure	3
Decided to close	10
Closed	1

What is needed to progress	Number
Write up	8
Actions in plan to deliver outcomes	15
Schedule/attend a meeting	0
Sign off	3
Response/decision from partner	0
Challenge partner on threshold	0
Receive a referral	0
Attendance	0
Send a referral	0
Closure write up	2





Permission to edit ICM documents

- Teams can make small modifications to the tracker table (e.g. colour coding or adding a column at the end) to suit their needs
- The summary tab pulls information from the “plan stages” and “what is needed to progress” columns, so these must not be altered. The summary tab is locked to avoid accidental alteration. Only performance officers should ever edit this (e.g. if something in the spreadsheet stops working). The password is CINSummary

ICM DOCUMENT: FAQS

Question	Answer
My ICM document is frozen	It is likely due to your internet connection. Wait a short while or switch connection.
Do new cases automatically appear in the document?	No. You need to add new cases to the bottom of the list. You can see if you have any new cases by looking on the PowerBI dashboard, drilling down to your team's cases and looking at their start dates.
What do I do with cases once they're closed?	Once closed you can delete that case from the tracker, either by deleting the text and leaving the row blank, or right clicking on the row number to delete the entire row.
How do I save the ICM document?	It auto-saves so no need to save copies. If you want to capture a snapshot of what it looks like right now, go into your team's folder, right click on the document title and select download. This will result in an offline copy going into your downloads folder. Do not edit in this as it is not the shared, auto-saving version.
It looks like some of the cases have suddenly disappeared	You or another user may have inadvertently filtered a column. You can tell this is the case if the row numbers on the left of the screen are not consecutive (i.e. some rows are hidden). Look at the column headings and ensure there are no filters by clicking the down arrow on the column heading cell and making sure all options are ticked.
Who do I contact if I need help with my ICM document?	Your locality's performance officer

ACCESS & USERS

Performance Officers are responsible for ensuring the right people can access their team's ICM document. If you should have access but don't, ask your performance officer.

Users

Admins (all localities):

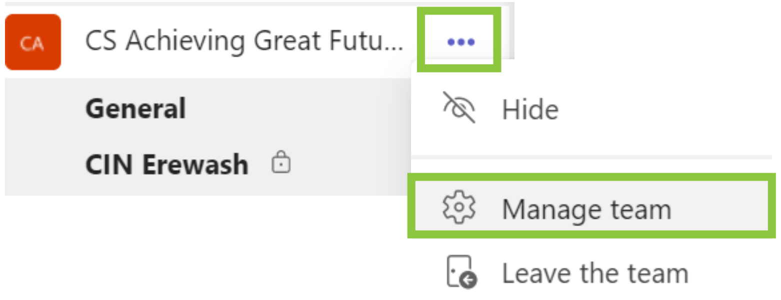
- Performance officers

User groups (in their locality):

- Team coordinators
- Practice supervisors
- Team Managers
- Heads of service
- (Experienced social worker nominated as PS stand in)

How an admin adds a new user (first add person to team, then to channel)

1. Open Teams and click the "Teams" button on the left-hand panel
2. Click the three dots on the CS Achieving Great Futures team
3. Click "Manage Team"
4. Add person as a member of the **Team**



5. Then click the three dots on the relevant locality channel "CIN [Locality]"
6. Click "Manage Channel"
7. Add person as a member of the **Channel**