Recommendations for providers
Planning and preparing

These recommendations set out the practical steps Be Caring took when planning and preparing changes to both their delivery model and wider service. They're informed by the planning and preparing building block section of the toolkit and can be adapted by other providers considering similar changes.

At the end of this section, we've included a list of resources to support the implementation of these recommendations.

Planning and preparing	Yes	No	N/A
Gather workforce data and staff feedback to clearly evidence the need for change, identifying systemic issues and opportunities for improvement. ■ Conduct regular staff surveys and exit interviews to identify pain points such as pay, scheduling and morale. ■ Use internal performance data (e.g. time spent on care calls vs travel/admin) to highlight inefficiencies and build a compelling case for reform. ■ Host informal engagement sessions to surface frontline insights and build trust.			
Action			

Planning and preparing	Yes	No	N/A
Align strategic objectives with organisational values, ensuring plans prioritise care quality, workforce wellbeing and long-term financial sustainability. ■ Facilitate co-design workshops with staff to define mission, vision and values that reflect ethical employment and person-centred care. ■ Ensure strategic goals (e.g. improved care quality, financial sustainability) are embedded in operational plans and communicated clearly across teams. ■ Use values-based communication in all internal messaging to reinforce cultural alignment and shared purpose.			

Action

Planning and preparing	Yes	No	N/A
Co-design mission, vision and values with staff at all levels to encourage ownership, strengthen commitment and embed lasting cultural transformation. ■ Engage external facilitators if internal capacity is limited to run inclusive workshops across all services. ■ Ensure outputs (e.g. values statements) are visible and referenced in daily operations, training and performance reviews. ■ Create mechanisms for staff to hold leadership accountable to these values (e.g. employee representative forums).			

Action

Planning and preparing	Yes	No	N/A
Pilot new service or workforce models in areas with supportive commissioning relationships to test viability, measure impact and build credibility. ■ Choose pilot sites based on existing trust, funding flexibility, and openness to innovation. ■ Start small with manageable teams and simple tools (e.g. spreadsheets) before scaling with digital platforms. ■ Use pilot data to demonstrate impact (e.g. increased time in care, reduced turnover) and build credibility with commissioners.			

Action

Planning and preparing	Yes	No	N/A
Identify and manage risks early through open communication, thorough contingency planning and phased implementation to reduce disruption. ■ Map potential risks (e.g. commissioner resistance, staff income concerns) and develop mitigation plans. ■ Offer one-to-one support and transparent updates to staff during transitions to new models. ■ Build contingency into funding agreements (e.g. reserve funds for hospital admissions) to maintain income continuity.			
Action			

Planning and preparing	Yes	No	N/A
Upgrade infrastructure to support change, including investment in digital platforms, HR systems, payroll and other core operational capacity. ■ If budgets permit, invest in bespoke digital platforms for rota planning, outcomes tracking and performance monitoring. ■ Expand HR and L&D teams to deliver training in digital literacy, values-based care and new procedures. ■ Reconfigure payroll and scheduling systems to reflect shift-pay models and ensure fairness.			
Action			

Planning and preparing	Yes	No	N/A
Plan a realistic, phased timeline with clear milestones to monitor progress, allow reflection and make adjustments while keeping momentum. ■ If fundamentally overhauling your current approach, begin with foundational changes (e.g. rebranding, co-design) before operational rollouts. ■ Mobilise each service over a 6-month period, allowing time for commissioner engagement, staff training and system updates. ■ Use pilot evaluations and feedback loops to refine approach before wider implementation.			

Action

Planning and preparing	Yes	No	N/A
Engage the right internal and external people at each stage, ensuring access to relevant expertise and shared ownership of the process. ■ Build leadership teams around complementary skills and allow roles to be adopted based on expertise and interest. ■ Involve staff in governance through representative bodies and regular communication. ■ Develop strong relationships with commissioners, social work teams and community partners to support integrated care delivery.			

Action

Further support

- **Adult Social Care Workforce Data Set (ASC-WDS) / Workforce Intelligence reports** - use workforce data to evidence the case for change, benchmark your performance with others (e.g. how retention rates compare) and identify issues, opportunities and risks.
- **A positive culture toolkit for adult social care** - offer frameworks for staff-led mission, vision and values development, supporting cultural change and engagement during pilots and phased rollouts.
- **Leadership programmes and CPD** - build leadership skills to manage change, assess risks and engage stakeholders, strengthening trust with commissioners and partners.