

Record of operational decision

Decision title:	Procurement of CHARMS Software for Shared Lives Herefordshire
Date of decision:	1st September 2025
Decision maker:	Corporate Director Community Wellbeing
Authority for delegated decision:	Chief Executive's scheme of delegation CW-01: Adult Social care operation and policy provision of assessment and care management.
Ward:	Countywide
Consultation:	Legal Services, Hoople ICT Procurement, Head of ICT & Digital (Corporate Services), Corporate Systems Team Leader (Hoople), Performance Officer, Project Manager, Information Governance and Shared Lives Carers
Decision made:	To purchase CHARMS software for the CQC Registered Shared Lives Service
Reasons for decision:	<ul style="list-style-type: none"> • CHARMS software is the only proven software solution that meets all Shared lives requirements • To implement a system which enables the digitization of Shared Lives, meeting CQC compliance • To ensure the security of information transfer between the Shared Lives team and self-employed Shared Lives carers • To increase efficiency and reduce costs associated with print, post, multiple recording systems and duplication. • The software will enable the growth of the Shared Lives scheme by making efficiencies in daily tasks providing extra time to develop the service, taking on more Shared Lives carers and individuals who need support, enabling the growth of Shared Lives and associated cost reductions of care by preventing the need for higher cost services and reduced family carer breakdown. • Facilitate effective data capture and reporting
Equality Considerations	<p>Equality Duty: The proposal has due regard to our public sector equality duty under section 149 of the Equality Act 2010. The public sector equality duty (specific duty) requires us to consider how we can positively contribute to the advancement of equality and good relations and demonstrate that we are paying 'due regard' in our decision making in the design of policies and in the delivery of services.</p> <p>The software will enable access for all, as it has accessibility functions built in. The software enables the bridging of the digital divide.</p>
Highlight any associated risks/finance/legal/equality considerations:	<p>Cost of CHARMS software is £37,968 over three years and is covered by the grant received from the Accelerating Reform Fund to develop Shared Lives. Potential on-going costs will be offset by savings created through Shared lives growth.</p> <p>Use of the software will ensure Care Quality Commission (CQC) and GDPR compliance</p>

<p>Details of any alternative options considered and rejected:</p>	<p>Access Community gateway portal tool to link submissions to Mosaic –</p> <p>This is currently a submission tool, working to alert workers to tasks and next steps. It reduces administration by requiring people to submit all the required information themselves. It could work for Shared Lives carer assessments.</p> <p>However, it is not an interactive tool which is what is needed for working with Shared Lives carers. They would not be able to:</p> <ul style="list-style-type: none"> • log in to view their information or that of the people they support. • View a library of up-to-date guidance, policies, procedures etc. • Initiate the submission of support records, health updates etc <p>Whilst it would capture some data, it won't capture all and is not designed for provider service quality monitoring of long-term arrangements and on-going relationships</p>
<p>Details of any declarations of interest made:</p>	<p>None</p>

Signed..... Date:

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