St Helens and Knowsley Hospitals NHS Trust Case Study

Expansion plans for eRostering, job planning and Allocate ActivityManager following on from the success with Allied Health Professionals

About the Trust

St Helens and Knowsley Teaching Hospitals NHS Trust provides a full range of acute and intermediate healthcare services across its sites at St Helens, Whiston and Newton hospitals. These include inpatient, outpatient, intermediate care, maternity and emergency services. With a workforce of over 6,000 staff, it cares for over 4 million people across the North West, North Wales and the Isle of Man. This includes being the lead employer for over 9,500 Doctors in training across 6 HEE's. The Trust was awarded "Outstanding" by CQC in 2019.

Laura Coding, Head of Strategic Resourcing provided an overview of the Trusts journey to date:

"The organisation was now four years into an eight year plan to roll out e-rostering/job plans across the Trust. All wards, theatres and the Emergency Department have now been 100% e-rostered on Allocate Optima since 2014. Consultants were also been moved to e-jobs plans in 2017 and Doctors in Training were fully implemented onto Allocate MedicOnline by 2018. This supported the Trust's reduction in agency spend in 2018/19 enabling both Nursing, HCA's, A&C and Medical staff to access bank shifts by RLDatix's App."

Operational Effectiveness

Rob Cooper, Chief Operating Officer wanted to get a more accurate real-time view of the Trust's clinical workforce capacity to gain a better understanding of how staff were utilised enabling a move to real time resource management and more effective activity management aligned to patient flows. As a result, the Trust Board's objective for 2018/19 financial year was to implement Allocate Optima and Allocate JobPlan for its AHP work force (Allied Health Professionals), a staff group made up of physiotherapists, speech therapists, occupational therapists, orthoptists, radiographers, sonographers and dieticians.

Claire Scrafton, Deputy Director of HR commented:

"I was delighted that the Trust was able to undertake the project as a national workforce proof of concept. The aim was to better understand how e-job planning and e-rostering across multidisciplinary teams could support future clinical role re-design and rostering by competency not just job title. The project also aligns with the aims of the NHSE/I Interim People Plan."

With its AHP staff based at a number of locations and spending much of their time in clinics, the Trust wanted to understand when and where and its staff were on shift, what duties they were performing and what capacity and capability were available aligned to demand.

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Maxine Gash is Electronic Resourcing Manager at the Trust and explained how the eRostering implementation was managed:

"We had two workstreams; one for the therapy staff and another for our radiographers. For therapy staff we implemented basic rostering and job planning at the same time. But for our radiographers, whose roster management was more complex, we implemented location based eRostering for them first, followed by job planning."

Creating a culture for job planning

The whole concept of eRostering and job planning was completely new to the AHP staff, so the Trust decided to start the roll out with the introduction of a paper job planning template to identify what specific tasks staff carried out on a day-to-day basis. Once introduced, each member of staff then had a meeting with their line manager to discuss what was expected from patient attributable care, non-attributable patient care and also their own CPD objectives. This then ensured that everyone was aligned to the service needs of their particular departments.

Maxine explained that clear communication with staff was critical:

"Given the cultural shift from paper based reporting to eRostering and electronic job planning, we created internal comms programmes to embed the process supported by our operational managers to ensure that we set clear expectations and objectives with staff at the outset."

Operational Benefits

Following the introduction of eRostering and job planning, the Trust now has greatly improved real time visibility of staff location, skills sets by competency and capacity.

Anne Moulton, Therapy Manager commented:

"We now have a real time view of which staff are on shift in each location and also an overview of the capacity. It's provided a platform to engage with staff and articulate the expectations of the service and individuals for that role enabling us to incorporate both the service objectives and the individual objectives of that member of staff within the job planning process.

"We are now able to fully identify the capacity of our current workforce and align that with the departmental service needs, identifying any gaps and ensuring our workforce is aligned to service requirements. For example, we have managed to reduce admin time for our therapy workers by devolving that to the therapy admin team, increasing the capacity of our therapy workforce."

"Allocate ActivityManager will inform our next round of job planning and service plans to ensure they are as accurate as they can be– it will enable the Trust to clearly identify the staffing capacity it has within each department and whether that is aligned to areas where we have shortfalls which can then be planned and budgeted for."

By job planning all of its AHP staff, the Trust is now able to classify how much of its time is spent on the ward based activity, how much is spent in clinics and how much in meetings or training. It has been able to determine which clinics they are attending and can also factor in any annualised activities.

Looking ahead

The proof of concept in 2018/2019 focused on the Orthopaedic department all staff groups. The next stage of the workforce programme in 2019/20 will be the rollout of RLDatix's Allocate ActivityManager to its medical workforce in other specialities which includes specialist nurses and Advanced Nurse Practitioners and across Theatres. This will then enable the Trust to have a view of its entire medical workforce in terms of the skills base and how it is utilising resources according to the short-fall of its service need. It will help to see our skills deficits and inform where it needs training and development.

Dave Miles, Assistant Director of Finance outlined the financial gains from the project:

"There are a number of benefits from a finance perspective. Firstly, job planning automation which gives a template and instant position for job plans. Also, ward based staff budget setting is improved, junior doctor staff ratios and budget planning is now more transparent and consultant productivity and compliance against job plans is more robust. WLI levels can be planned and costed more proactively which enables better management of bank and agency pressures. Theatre utilisation and clinic utilisation improvements will be realised in the future and finally IT supports cost improvement plans and other benefit realisation opportunities.

The next stage of the programme will help us to improve our service planning, workforce and patient activity modelling and optimising our use of resources. It will also help managers to work with staff to ensure they a fulfilling role with opportunities for job enrichment, skills escalation which is really key to our recruitment retention. We also want to embed our KPIs into the management of our nursing and AHP staff and ensure we are then constantly reviewing the way we are resourcing."

Levels of Attainment

The 12 month project implementation of eRostering and job planning has enabled the Trust to achieve Level 2 for its Levels of Attainment for its AHP workforce. With the next phase of the project focusing on the roll out of Allocate ActivityManager, the Trust is confident that it will be able to align team objectives, departmental budgets and the trust's objectives so it can respond dynamically to services' changing needs – thus attaining Level 4.