

## Calderdale and Huddersfield NHS Foundation Trust Case Study

Deploying Allocate Me to empower staff, improve work-life balance and reduce agency spend.



### About the Trust

Calderdale and Huddersfield NHS Foundation Trust employs 6,000 staff who deliver care from its two main hospitals sites as well as in community

sites, health centres and patients' homes. Following the Trust's successful implementation of Allocate's HealthRosterOptima e-Rostering system across its nursing staff, it decided to expand capabilities further with the Allocate Me app.

The comprehensive platform has enabled the Trust to optimise staffing, increase staff retention and reduce agency spend by 10%, while ensuring efficient and high-quality hospital care.

### Transforming nursing staffing

The Trust's rollout of Allocate's system has been led by Rose Hagreen, Head of eRostering Nursing and Midwifery Services.

*"In April 2018, we were under intensive scrutiny from NHS Improvement (NHSi) to reduce our off-framework shift usage. At the same time, we were announced as one of 12 Trusts to participate in a Department of Health and Social Care (DHSC) pilot designed to improve workforce productivity, increase staff retention and reduce spending on agency staff. This pilot was very timely. We saw it as an instrumental way to expand use of our own temporary workforce and meet the NHSi requirement to reduce off-framework agency use."*

DHSC highlighted Trust culture, capability and behaviours as key components to the success of the pilot. The pilot launch was scheduled for August 2018 and a project plan was developed with staff engagement identified as the key to achieving a successful outcome.



### Allocate Me provides key to staff engagement

The Trust recognised that it needed to use the latest technology to make it as easy as possible for staff to book shifts. It decided to add the Allocate Me app to its e-Rostering system, replacing the previous web-based tool used by staff to book leave, training days, request shift swaps, review pay records and view future shift patterns.

*"The app format made it much easier for staff to access rosters, wherever and whenever they wanted, and provided new functions such as swapping shifts between themselves. It gave them more flexibility and control than they'd had before, letting them manage all aspects of their work/life balance from their phone, which is increasingly important to the next generation of workforce."*

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Lisa Cooper,  
Medical E-Rostering  
Project Lead

Allocate Me includes functionality for staff to view and direct book onto outstanding unfilled shifts. Individuals can also view shifts currently filled by an agency worker and opt to work the shift instead, further decreasing agency spend.

### Encouraging staff take-up

Allocate worked with the Trust to ensure that the Allocate Me rollout was straightforward right from the start. The app is designed to be as user-friendly and accessible as possible; it's available for download from mobile App stores or on Me Web via tablets or PCs, enabling staff to access to it independently, without reliance on eRostering Team support.

*"A smooth rollout was essential to encouraging the necessary take-up from staff. We worked with Allocate to develop a joint internal comms plan that included engagement and encouragement to download and try Allocate Me. We've now evolved this into a comms portal that all nursing staff can access when they need help."*

*Allocate Me also works in conjunction with our HealthRoster suite of products displaying information bespoke to individual staff member's skills to work in their assigned role, making it feel very relevant."*

**Delivering results**

The nursing team's migration to Allocate Me has delivered significant results and more than 3000 members of staff now have the app on their devices.

*"Allocate Me plays a pivotal role in better utilising our nursing workforce. We have seen a 9% increase in active e-Rostering users following migration to the app. Of these, 91% use Allocate Me to access their rosters, with 74% of them accessing it via a phone or tablet. As a result, we've reduced temporary staffing spend by 13.5% while also ensuring patient safety and improving morale as staff have better management of their work/life balance."*

**The Trust has achieved a 3% increase in shift bookings and a 114% increase in direct bookings, which led to 10% reduction in agency spend – an annual cut of £296,000.**

*"The results have been significant. Beyond our ability to deliver on the NHS strategic imperatives of patient safety and cost reduction, we have a desire to influence and lead the NHS digital agenda by being recognised as a Global Digital Exemplar site (GDE) by NHS England. Statistics published in February 2019 have seen our position in this regard rise from 113th in 2014 to joint first."*

**Next steps**

Following the success of the rollout across nursing, the Trust is now rolling out E-Rostering and Allocate Me to all non-Consultant grade medical staff using Allocate's HealthMedics system.

**Lisa Cooper – Medical E-Rostering Project Lead:**

*"Introducing Medical E-Rostering technology will benefit both staff and patients. Having a real-time view of where our medical staff are working means we have the right number of staff with the right skills on duty at the right time. This reduces clinical risk, enhances the quality of care to patients and ensures a safe working environment for our medical workforce".*

*"We plan to embed Allocate Me alongside the wider medical workforce E-Rostering implementation programme commencing April 2019. The software will allow medical staff to have a live view of their rota and allow them to apply for leave remotely at any time, providing them with greater control over their working life."*

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