

## Newcastle Upon Tyne Hospitals NHS Foundation Trust Case Study

# Creating accurate transparent trust-wide resourcing and planning



### About the Trust

Newcastle Upon Tyne Hospitals NHS Foundation Trust is one of the busiest, largest and most successful teaching NHS foundation trusts in the United

Kingdom with over 1,800 beds, 14,000 staff and an annual income of £1billion. Last year the Trust cared for 1.84million patients across its seven main sites.

Providing innovative, high standard healthcare, including community services and primary care, the Trust is also the second largest provider of specialised services in the country and support people with a range of rare and complex medical, surgical and neurological conditions, cancers and genetic orders.

### Introducing e-Rostering

In January 2017 the Trust introduced e-Rostering and Allocate's HealthRoster was rolled out to all 13,000 staff (excluding medics) in a 'big-bang' go live approach by October 2017. It's aim in the first year was to establish the HealthRoster platform across all departments, ensuring all staff were effectively using the live e-Rostering system and that everyone was paid correctly as the baseline goal.

Samantha Cardwell is e-Rostering Systems Manager at the Trust and managed the roll out of the project.

*"Deploying HealthRoster was a significant project for us to rollout and it was important that we got this right and working successfully before we moved on to our next priority, which was the rollout of SafeCare from Allocate, a real time, patient led, staff monitoring tool. This would enable us to make sure we have the right staff in the right place at the right time."*

### Deploying SafeCare

Once the HealthRoster rollout was completed, the Trust was able to focus on the deployment of SafeCare which tracks patient acuity scores allowing staff to plot the staff requirements on a particular ward by patient dependency. On a day to day basis matrons have immediate access to information which highlights how safe their wards are and how the staff are meeting the needs of the patients. This data can be used to analyse precisely whether the workforce is sufficient and where its live staffing resource should be deployed.

The Trust is currently in the middle of rolling this phase out and expects to have completed the project by mid-October 2019.

Samantha explains how the rollout is going:

*"We are working closely with the senior nursing team to deliver the project to date. Already, we have been able to get a highly accurate picture of hours worked by all levels of staff. One of the things that assists us with the accuracy of data and that sets us apart from many other organisations is our use of technology enabling staff to register their attendance in real-time at the start and end of each shift using their payroll number or via EmployeeOnline."*

*This ensures that the picture we get from SafeCare is reflective of what is actually happening on the Wards. By rolling out SafeCare across all of our wards, we also anticipate to be able to reduce a percentage of our temporary staff spend and make sure we are more effectively deploying our live resource."*

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Samantha Cardwell, e-Rostering  
Systems Manager

## Managing Staff Demand

Another area the Trust focused on was to ensure that all resource planning was as accurate as it could be by working on demand templates as part of the Allocate e-Rostering system. The Trust's demand templates monitor the resource requirements, by level, for each ward. The process took the Trust about a year to complete in line with the Nurse Staffing Review and encompassed around 150 clinical units.

Samantha explains; "We collaborated with our senior nursing team to create the clinical demand templates which ensure that we have accurate budgets in place for the required resource. The clinical leads met with all of the ward sisters and matrons to gather their input on resource requirements and this was combined with the acuity and dependency scoring data that the Trust had collated over many years. This data showed the acuity of the patients and the required Care Hours per Patient Day (CHPPD) required to safely care for the patients. We then took a tri-angulation approach when compiling the data by aligning the information from the e-Rostering system with the information from the ward sisters on the staff in post; and then the latest budget information to get a completely accurate picture. It's been a really good exercise for us and has given us the opportunity to look at skill mixes of staff and how we can tailor shifts and budgets more effectively."

## Trust Wide Budget Visibility

The e-Rostering team has compiled the data by directorate and then extrapolated this for the whole Trust. It has been able to monitor the positive and negative variances by directorate and then collated that information to give a baseline figure for both each directorate and also for the Trust as a whole to give an exact position of where the Trust is against

Samantha explains;

*"This process has finally given us a joined up approach to our budgeting and resourcing which we're able to share with Matrons, Directorate Managers, Finance and HR, giving them an accurate and up to date picture. Now that we also have accurate demand templates and real-time picture and we can forecast six weeks ahead; we will be at a point where we can introduce the functionality within Allocate's RosterAnalyser and RosterPerform."*

The RosterAnalyser functionality allows ward sisters to have more visibility and control over their planned rosters to ensure they are striving to reach the Trust KPI's in relation to budget, headroom, safety, effectiveness and fairness. The RosterPerform software will allow the Trust to compare and report on key KPI's across units, directorates and the Trust as a whole and enforce the 'Ward to Board' engagement agenda. Overall this will aid the Trust in ensuring efficient and effective rosters are created aiding our patient safety levels and reducing costs.

## Looking ahead

Once the SafeCare rollout has been completed, the Trust will move onto showcasing and training staff in the functionality and data within the RosterAnalyser and deploying high level metrics for reporting within RosterPerform. The technology deployed so far is supporting the Trust's progress against the Levels of Attainment set by NHSi.

Currently Newcastle Upon Tyne Hospitals NHS Foundation Trust is at Level 1 and once the SafeCare module has been rolled out, they will have fulfilled a lot of key elements from level 3, with the forthcoming Auto-Roster roll out helping to fully secure Levels 2 and 3.

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