CUSTOMER STORY

NHS Forth Valley

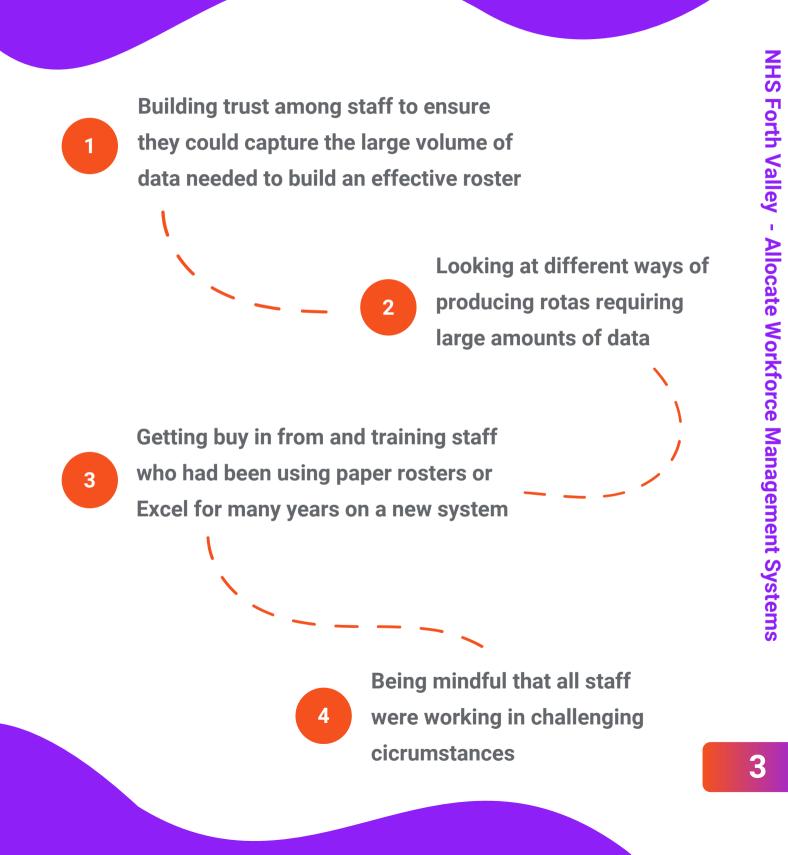Building trusting relationships to create fair and efficient rosters

RLDATIX

NHS Forth Valley was one of the first health boards in Scotland to start the implementation of Allocate Workforce Management Solutions as part of an initiative to create a single solution across all health boards.

It started by implementing Allocate Optima (Health Roster) within the ED, which had faced challenges with fairness in rostering due to the high numbers and complexity of staffing roles, which encompassed both medics and nursing.

The staff group included around 100 whole time equivalent roles on the nursing roster and 42 on the medics roster.

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THE MAIN CHALLENGES

1 Building trust among staff to ensure they could capture the large volume of data needed to build an effective roster

2 Looking at different ways of producing rotas requiring large amounts of data

3 Getting buy in from and training staff who had been using paper rosters or Excel for many years on a new system

4 Being mindful that all staff were working in challenging cicrumstances

Between November 2021 and July 2022, an implementation team of seven people was set up to roll out an auto-roster system. The team, supported throughout by RLDatix, was split into two; one for medics and the other for Agenda for Change staff.

The teams worked closely with individual rostering teams to:

- Understand daily staffing demands and the variety of shifts needed
- Provide visibility of the current rosters staff were working from
- ensure the doctors' roster was compliant with Scottish Government guidelines
- Incorporate doctors' study time

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THE RESULTS

1 A fairer process through measures such as tailoring the amount of shift requests to four per month. All shift requests are now received through a central point.

2 More control over shifts and annual leave through the Allocate Loop app, giving staff access through their phone rather than paper. This allows everyone to view the roster at the same time, so no-one is at a disadvantage.

3 Temporary and bank staff can see the same information as everyone else.

4 Greater consistency and visibility of rosters across the trust.

5 Staff to see in advance at a glance how many shifts still need to be filled.

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Be realistic with your expectations - it takes longer than you think an can feel like a challenge, but stick with it.

Invest time in implementation and it will pay off in the end.

Ensure buy in and support from senior management.

Take time to build trust and relationships.

Provide continual support and training.

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