



## NHS Southampton City

### NHS Southampton City use HealthRoster to achieve efficiency savings while maintaining the highest levels of care

#### The challenge

Like any Community Provider Organisation, the workforce forms the biggest proportion of NHS Southampton City's annual spend, and effective management is key to managing costs and maintaining optimum levels of care. Southampton is home to some of the best healthcare in the country with excellent hospitals and clinics, highly skilled staff and groundbreaking research.

One of the PCT's biggest challenges is to manage highly complex rosters of diverse, integrated and mobile staff groups that practice across different locations, team structures, delivering increasingly specialist care. In challenging financial times, the PCT was focussed on new ways of improving efficiency and removing any wastage through current processes. Improving the existing situation was not possible by simply enhancing existing processes. A need for greater transparency and objectivity of staff deployment could only be delivered by the application of an e-Rostering solution.

#### Improving rostering practices

The Trust's decision to procure an e-Rostering solution was driven by the fundamental requirement to record a clinical area's service demands; against which good and bad practice of the utilisation of staff hours can be measured. The adherence to a clear policy around staff working practices was at the heart of the new approach. The requirement to manage a robust pandemic flu plan, taking into account staff availability, along with their skills and competences, escalated the urgency of the requirement for a real time operational view of staffing.

#### Choosing HealthRoster

The Trust's procurement panel and the senior management team met with multiple solution providers undertaking an exhaustive review. Following this review, the Trust chose Allocate Software's HealthRoster solution. Allocate's commitment to PCT specific functionality such as location-based rostering and the e-Expenses module was also a factor in the decision making.

#### A proven solution for community-based teams

The solution has proven capabilities to improve the internal processes across the entire workforce. Its ability to operate within community-based teams, as well as Allocate's demonstrable expertise and experience of working with PCTs was also key to the Trust's decision; "We could see straight away the benefits to the organisation, not only ward-based but also making it easier for those based in the community." **explains Lynda Bicknell.**

#### Summary of Key Benefits:

- ▲ Increased utilisation of Substantive staff
- ▲ Increased visibility of staffing issues
- ▲ Managed the flu plan
- ▲ Major administrative time savings
- ▲ Savings of up to £2 million
- ▲ Reduced usage of bank and agency staff
- ▲ Fairer rosters for staff
- ▲ Improved delivery of care services

"If tangible savings identified so far are replicated across the organisation, and there is no reason to suggest that this would not be the case, it would mean we exceed our forecasted savings of £2 million over a three year period."

Lynda Bicknell, HR Manager

"We were quite clear about what we required and knew exactly what we wanted from an e-Rostering system: ESR links, competency reporting and the ability to record dependency levels on wards. After a robust competitive tendering exercise, we felt that the most appropriate and capable solution to meet our needs was HealthRoster."

Lynda Bicknell, HR Manager

As Lynda highlights, the solution's proven integration with ESR was an important factor and allied to a proven track record, particularly with community based teams, was key. Use of HealthRoster has proven to improve levels of control to effectively manage nursing and medical staff who are geographically disparate.

The solution will also be used to help streamline labour intensive administrative processes, such as timesheet submission and approval, **as Lynda explains;** "We had 47 rejected timesheets last month and the ESR team, team managers and HR department have to individually review, assess and reject the submitted timesheets which then have to be re-issued. This is a very lengthy process and we can anticipate huge time savings once HealthRoster is fully rolled out."

## Supporting the Flu Plan

Another deciding factor in choosing HealthRoster is its powerful reporting capabilities, particularly regarding sickness and the instantaneous access to this information for flu planning. **As Lynda confirms** "Skills are put into the system allowing easy auditing of training requirements, thus keeping competencies up-to-date ensuring people with the correct skill mix can be deployed when needed."

The solution also enables managers to quickly access real time data on sickness, which not only ensures that correct data is reported to the SHA, but also ensures safe staffing levels at service area level. The data held on ESR is only updated on a weekly basis, so the Trust were always viewing this information retrospectively; HealthRoster's ability to provide this data in real time was seen as a vital component to producing their robust flu plan.

## The implementation

The implementation project began in June 2009 with an initial roll out across four nursing wards at the Royal South Hants Hospital and the Western Hospital. With a full roll out to all community-based teams and units due to take place by April 2010; the Trust's aim is that all 1,000+ rostered staff will be live on the system by mid 2010.

The implementation of HealthRoster has given an overarching view of the rosters across its live units to enable more effective staff allocation and deployment to where the demand is.

## The outcomes

Since the introduction of HealthRoster, Managers and Head of Business units have been able to operate more flexible shift patterns to ensure staff are managed as efficiently as possible, take corrective and appropriate action and redesign service delivery to ensure that a consistent, excellent service continues to be delivered.

The project has already been acknowledged as a key element in supporting the Trust's efficiency drive whilst maintaining delivery of the highest quality care across all units. Multiple savings across all departments have been identified following Phase 1 of their implementation project. A more formal audit is due to be carried out shortly which will cement these early findings and record quantifiable savings from all perspectives:

- Major time savings have been made on the production and maintenance of rosters, and this is expected to increase with the introduction of auto-rovers releasing more time to care
- Reduced usage and reliance on bank and agency staff - Substantive staff are more easily re-deployed using HealthRoster due to increased visibility of staffing across the units
- Visibility across services of past, present and future data enables problems to be fixed before they have happened
- Pressure has been taken away from the unit managers for shift changes, allocation of duties etc due to objective production of roster
- Managers have become much more aware of staffing issues and staff work patterns
- Staff absenteeism due to annual leave, training and sickness is much easier to manage, track and report on due to the transparency of the system
- Substantive staff are being utilised more effectively
- Visibility of units allows staff to see who is the most senior person on duty reducing unnecessary calls to 'on call' managers



"The Rapid Response Team implemented e-Rostering back in September 2009, since then we haven't looked back! The team have enjoyed the flexibility of being able to request online and the 'auto roster' button has shaved hours off my working week! This year we are looking to work towards a paperless off duty/annual leave system and we are excited about the prospect of no more salary claim forms."

Gary Cleeve, Nurse Manager of the Rapid Response Unit

"I really appreciate the time savings – producing the roster is taking half the time since I have started using the e-Roster, and when we start auto rostering this will be reduced no end because it will do it all for us."

Maxine Spincer, Manager Inpatient Area at Western Community Hospital

- Staff have become more willing to change shifts and work unsociable hours if there is a requirement as they are more clearly able to see when and where the need is
- Rosters have become fairer as managers can identify staff regularly working unsocial hours
- The solution has supported additional work being carried out around incidences, which can now be monitored and tracked to minimise occurrences

## Managing the change

Legacy shift patterns and shift arrangements have lead to a series of process improvements needing to take place in order for the solution to work effectively and to its full potential. Talking of the implementation across the nursing wards, **Fiona Baldwin, Head of Inpatients and Community Hospital Services comments**, "The implementation of the solution has really brought to light areas and issues that we needed to address but didn't know about, these are things which we can now improve to ensure that we are using our staff in the best way to meet patient demand. It is going to be a big project to address these issues, but HealthRoster is the tool to help us do this."

In common with all NHS organisations, unit managers were initially wary of the technology, particularly those who are not regular computer users but with help and support from the e-Rostering project team, who encouraged them to become more familiar with the software, they are now in a position to trust the system and are confident with the results.

## The next steps

The Trust has already made operational savings and efficiencies since implementation of the solution began in June 2009. A Benefits Realisation Programme has now been initiated to run in parallel to the implementation. This will ensure that continuous assessment is being made to determine the financial savings from the project and reported back to the Board.

"If tangible savings identified so far are replicated across the organisation, and there is no reason to suggest that this would not be the case, it would mean we exceed our forecasted savings of £2 million over a three year period." The Trust are now working towards full roll out across the community, and using the lessons learnt so far to assist with the implementation.

**Lynda sums up the experience;** "This project has really facilitated change; I hadn't envisaged how much change it would facilitate! We now need to build on the foundations that have been put in place which has already helped ensure staff utilisation is maximised, and the right staff can be deployed quickly and easily to meet whatever the demand is. We are now confident that we can exceed savings of £2 million over a three year period, however at the heart of the project is releasing time to care."

## About Allocate Software

Allocate Software is the leading workforce optimisation software applications provider for world-wide organisations with large, multi-skilled workforces. With over 18 years' experience, they ensure customers can match operational demands with workforce supply. Using Allocate Software's workforce optimisation software application, organisations can deploy the right people with the right skills, to the right place at the right time. With Corporate headquarters in London, regional offices in the UK, USA, Australia and Malaysia, Allocate Software provide services and support to an international customer base across Europe, North America and Asia Pacific. Founded in 1991, Allocate Software plc is listed on the AIM market of the London Stock Exchange ("ALL"). For further information please visit [www.allocatesoftware.com](http://www.allocatesoftware.com).

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