



ALLOCATE AWARDS 2015

People at the heart of healthcare

Allocate
Awards 2015

2015 Judges



Dr Ben Thomas
Mental Health, Learning
Disabilities and Dementia
Care Professional Officer
Department of Health

Ben provides professional advice to ministers and other senior officials on matters relating to mental health, learning disabilities nursing and dementia care. He also provides national leadership to all nurses working in these areas in England. Ben chairs a number of national advisory groups and is a Fellow of the Royal College of Nursing, Honorary Senior Fellow at Kingston University and St George's University of London, and Visiting Professor at London South Bank University.



Daniel Mortimer
Chief Executive
NHS Employers

Daniel joined NHS Employers in November 2014 from his role as director of workforce and strategy at Nottingham University Hospitals NHS Trust. Daniel has a degree in politics at York University and is a fellow of the Chartered Institute of Personnel and Development.



Dean Royles
Executive Director of HR and
Organisational Development
*Leeds Teaching Hospitals
NHS Trust*

Dean was appointed at Leeds Teaching Hospitals in 2014. Previous roles include chief executive at NHS Employers, director of workforce and education at NHS North West, director of HR and communications at United Lincolnshire Hospitals NHS Trust and deputy director of workforce for the NHS at the Department of Health, where he was responsible for developing a national HR strategy for the NHS. He was voted HR's Most Influential Practitioner in 2012 and 2013.



Jenni Middleton
Editor
Nursing Times

Jenni has been the editor of Nursing Times since 2012. During her time as editor, the magazine and website has won three Online Media Awards, one British Media Award, a PPA New Talent Award and two British Society of Magazine Editors Awards.



Ruth May
Nurse Director
Monitor

Ruth was appointed as nurse director for Monitor in July 2015 providing senior nursing advice and leadership as part of the patient and clinical engagement director. Prior to joining Monitor, Ruth was the regional chief nurse for NHS England (Midlands and East), nurse director for the NHS Midlands and East SHA and chief nurse at NHS East of England.



Dr Stefan Cantore
Principal Teaching Fellow in
Organisational Behaviour and Human
Resource Management
University of Southampton

Stefan is a principal teaching fellow in organisational behaviour at Southampton Business School. Alongside this, he publishes his own work, presents at conferences and acts as a change and development consultant to a wide range of organisations across all sectors. He has also been an NHS trust chief executive.

Foreword

Welcome from the chief executive



Welcome to the Allocate Award Winners 2015.

The Allocate Awards, now in their fourth year, are designed to recognise and celebrate the achievements of our customers.

Within health and care, there is much focus on sharing best practice, particularly around healthcare workforce planning and deployment. Through the Allocate Awards, we have the opportunity to highlight some of this excellent practice and mark positive outcomes. By sharing experiences and steps taken, it is my hope that others can learn from these successes.

I would like to thank our truly prestigious panel of judges for their time and I would also like to thank NHS Employers, which has run the awards process for us this year. The award process and judging is completely independent from the Allocate team.

I am delighted to say that we saw an unprecedented response to the awards this year, with more entries than in previous years. This of course means that competition has been fierce in all categories. I would like to pay tribute to all those that have taken time to enter – too often there is little or no time to stop and reflect on achievements. I sincerely hope that for all entrants the time you have taken to document your journey is worthwhile and helps you share your story more widely. I'd like to pay tribute to all the shortlisted organisations. The judges have clearly highlighted your work for recognition. Last but not least I would like to congratulate the winners whose stories are shared in this booklet.

Dr Sati Sian
CEO, Allocate Software

Award for using information for improvement and assurance

Winner

Northampton General Hospital NHS Trust

The governance team has successfully implemented HealthAssure, a solution which manages the trust's serious incident action plans. The new solution is a vast improvement on previous reporting and provides a more efficient and effective assurance process.

The trust's governance team is responsible for demonstrating that recommendations resulting from serious incident investigations are implemented and evidenced. They must also provide assurance of this to the commissioners.

Serious incidents have always been investigated, with subsequent action plans being created to prevent the incident happening again. However, there was no consistency in the process of collating evidence and therefore assurance was sometimes hard to provide.

With its sophisticated open system, the team saw that HealthAssure could offer a solution to manage the serious incident action plans and provide a more efficient and effective assurance process throughout the trust. They worked with Allocate to prepare HealthAssure to provide a system where action plans could be uploaded, allowing the trust to state what the action is, the date for completing actions, the action owners, the action sponsor and the RAG status.

The governance team held a number of meetings to map the process, taking into consideration the trust's needs, the capability and potential of the system. They also piloted and regularly reviewed the evolving process, considering users' comments and suggestions during the project.

The main challenge the team faced was around staff engagement. Staff had to embrace the change to an all-electronic system, which would

require them to collate and evidence assurance against the action plans. The team remained enthusiastic and overcame this challenge by introducing regular meetings and training. As the process evolved, staff became more engaged when they realised the many benefits of the system in the compliance and assurance agenda.

The team ensured staff received relevant and effective one-to-one training, so they understood the system and its benefits.

Simon Hawes, quality assurance manager, said: "The impact for the trust has been immense. We can easily provide assurance reports to our commissioners and use them in internal meetings, directly from the system. It has enabled the governance team to embrace HealthAssure and continually develop and enhance the system to a point where new areas are already being used for action plan assurance, with others being considered as well."

The trust's commissioners have commented that the availability of evidence is a vast improvement on previous reporting and they are assured as to both the processes and action plan evidence.

Other departments have expressed an interest in using the action plan assurance process as a basis for their own action plans. Litigation, complaints, safeguarding and infection prevention have already begun uploading action plans to HealthAssure with great success.

As a result of the governance team's efforts, the serious incident action reports are widely distributed within the trust and HealthAssure is now recognised as a robust and effective system for assurance.

Award for using information for improvement and assurance

Highly commended Burton Hospitals NHS Foundation Trust

The e-rostering team set up a highly effective process for reviewing rosters on a regular basis, incorporating senior nurses and finance. By using elements of HealthRoster and BankStaff, the team has improved the management of annual leave, reduced short-term sickness by 1.5 per cent and reduced temporary staffing usage across the trust.

The team plays a central role in helping to improve rostering and also supports senior nurses to improve compliance with key performance indicators (KPIs) and staffing budgets. They established that senior nurses were making decisions about staffing levels without having a complete overview of staffing issues. This was also influenced by the finance team, which was purely looking at wards' staffing levels based on budgetary information.

By using elements of the HealthRoster system, the e-rostering team identified that senior nurses and finance would be able to make more appropriate decisions on ward staffing levels because they could analyse and discuss the data.

Through the reporting functions, the team provides information to the senior nurses which helps them when approving rosters for staff. They also provide a visual overview of future rosters, identifying areas of concern with regards to staffing levels and skill mix. The head nurse, matron and finance adviser for each division meet with the team and review the rosters. Scrutiny is applied to all areas of the roster and details of vacancies, maternity leave and long-term sickness is agreed. The roster

analysed and annual leave report are reviewed to ensure compliance with agreed annual leave levels. The net hours report is also reviewed to avoid the accumulation of lieu time.

The e-rostering team held regular meetings with finance, which provided assurance that the software gave a true reflection of staffing information.

The results have been positive. There has been a reduction in temporary staff usage due to better use of staff contracted hours. There has also been an increase in bank staff picking up unfilled shifts, resulting in a reduction in agency spend. This is due to the rosters being produced and approved promptly.

Cathy Brown, quality improvement lead for the trust, said: "The management of annual leave has improved, resulting in a better spread throughout the year with appropriate levels of staff at peak times or at the end of the financial year."

By using the roster production timetables, the number of shift swaps have reduced and staff morale has improved. There has also been a reduction in short-term sickness on the wards by more than 1.5 per cent over the last six months.

The e-rostering team has an excellent understanding of HealthRoster and BankStaff. This allows them to use the software to provide accurate information to help influence decision making by the senior nurses. Finance and senior nurses now have assurance that the wards are staffed safely and efficiently.

Award for using information for improvement and assurance

Highly commended Doncaster and Bassetlaw Hospitals NHS Foundation Trust

The trust needed to assess the effectiveness and efficiency of its current rosters system and used a suite of Allocate's software solutions to collate and analyse data. Following the assessment, and implementing of e-rostering, the trust has seen many savings and efficiencies. The trust has increased patient-facing time by 18 per cent and saved £650,000 annually in the first five months of implementation.

The team used RosterPerform data to analyse how the trust's rosters have been performing, identify good practice and highlight areas for improvement. These were then presented to the executive team and senior leaders to gain support for the need to change.

Initially, the team faced challenges around the data they were providing. It wasn't seen as accurate and some contradictory data was circulating. To overcome this, the team spent time working with each and every ward to cleanse the data and worked with finance managers and ward management to establish baselines. The cleansed data gave the team a starting point to work with and reports were

created using RosterPerform and HealthRoster to measure and monitor performance against targets.

Another challenge for the project was that it wasn't seen as a high priority for some areas of the trust. However, after the data cleanse had taken place, performance, spend and quality of service could all be accounted for and, over time, confidence and trust in the new system grew. Reports became a standard process across the organisation and they are now being used widely throughout the trust.

Jason Mullarkey, project manager, said: "RosterPerform and HealthRoster provided the vast majority of the information required. This data complimented the customer data we had collected and it was used in many of the stages of the project."

This project has enabled the trust to accurately report performance against targets, deliver a better quality of service, reduce spend on agency and bank staff and improve the redeployment and sharing of resources.

Award for staff engagement

Winner

Derbyshire Community Health Services NHS Foundation Trust

By introducing BankStaff and HealthRoster, the trust reduced its agency usage by 17 per cent. The staffing solutions team has been able to increase its visibility and accessibility, helping to strengthen the team's bond with bank workers and reduce the isolation of remote workers.

The team was taking in excess of 1,000 calls a week from bank workers wanting to book shifts and have their queries answered. Bank workers became frustrated when they couldn't get through to the team due to high call volumes and more detailed queries were taking longer to be answered. There was no opportunity for the team to forge relationships with the workers because of this constant stream of calls and queries.

A new way of working was needed, one which would increase engagement, satisfaction and commitment, but also motivate bank workers to aim higher and take on more challenging assignments. Plus, the trust covers a large geographical area in a community environment with some hard-to-reach locations. Engaging with these workers was always going to be challenging.

A 24-hour system was needed to support the 950-strong workforce of registered general nurses, therapists, ancillary and administration workers. The system had to be easily accessible to the workers and not be reliant on the previous telephone service that was offered.

BankStaff, HealthRoster and the 24/7 systems have made a significant impact on the relationship between the team and the bank workers. The system is available online and through mobile devices.

Bank workers can now control their own schedules, which has improved productivity

and shift awareness and calls to the team have reduced by 30 per cent. It has even helped support talent attraction and retention and some bank workers have been employed on a permanent basis.

The team can now email the bank workers, providing a more personalised approach to communicating. Relationships have been built as the team has more time to provide an efficient service. They also produce a quarterly newsletter, which includes key messages about mandatory training, appraisals and how-to guides. The newsletter has been welcomed by bank workers as they feel more engaged with trust-wide activities.

The trust is keen to ensure that bank workers remain an effective part of the workforce, so each week bank workers are randomly selected and asked to complete a feedback form. The feedback has shown that 100 per cent of bank workers are satisfied or highly satisfied with the process of communication regarding their booked shifts and 97 per cent of bank workers are satisfied or highly satisfied with the overall experience of the bank worker placement.

The annual appraisal feedback has improved and clearly demonstrates a more engaged workforce. Bank workers appreciate the work-life balance this system offers because it reduces their commuting time and they are in control of their own schedules.

Sara Boulton, staffing solutions team leader, said: "Bank workers have successfully filled an average of 89 per cent of bank shifts, consistently above the benchmark of 80 per cent, ensuring that our services are staffed adequately to meet the needs of patients. The 17 per cent reduction has brought greater consistency in care and a skilled workforce trained in the culture of our organisation, which in turn has improved patient experience."

Highly commended South London and Maudsley NHS Foundation Trust

South London and Maudsley NHS Foundation Trust has used Allocate software to engage 350 consultant doctors across the globe, while maintaining excellent patient care.

South London and Maudsley provides the UK's widest range of mental health services. Staff are positioned in the Middle East and work internationally through the trust's partner charity, Maudsley Charity. In addition, more than a third of consultants work under dual contracts with King's College in London. The organisation needed to develop a system for effective job planning and appraisals that could meet the needs of this varied workforce.

Over the last four years, the revalidation and job planning team has used Allocate's web-based system to provide a central system for collating job plans and appraisals. Staff have one set of login details and managers can access dashboards that allow them to access relevant data quickly across their department. The appraisal system has also been streamlined. Staff stationed overseas are able to access previous appraisals wherever they are in the world, and can complete their appraisals via Skype.

The trust's use of Allocate software has resulted in a direct increase in staff engagement. Staff found it easier to access and update job plans and the trust has seen a large improvement in both the quality and quantity of information gathered through appraisals. The software also allows managers to carry out job planning as a team, pairing up consultants where necessary, allowing directors to share their workload effectively and support individual doctors to pursue their own development needs.

Koravangattu Valsraj, consultant psychiatrist and associate medical director, revalidation, said: "One size does not fit all. However, this system helped us to achieve a single platform for our consultants across a wide geography in different continents and countries. One hundred per cent engagement is possible, and we are seeking feedback through various forums so that we can make ongoing and continuous improvements."

Award for staff engagement

Highly commended Sherwood Forest Hospitals NHS Foundation Trust

Engaging staff from the outset was key to ensuring the small, dedicated team at the organisation could face the difficulties of implementing a new e-rostering system, including overturning negative attitudes to previous rostering systems.

The implementation team, which is made up of one lead and four administrators, recognised that good staff engagement with a new, smarter system was essential from the start.

Staff were involved at an early stage through a series of meetings and staff forums, which were then followed up with presentations from Allocate to alleviate concerns and misconceptions. The trust identified managers to lead the project and provide a key point of contact for all staff.

One of the success stories was the introduction of Allocate's e-job planning system. Many of the trust's doctors had job plans that were not reflective of their current activity and leave allocation was unclear. In implementing the new system, the trust produced anonymous samples of job plans to highlight discrepancies across the organisation. The trust worked with the local negotiating committee and representatives from the British Medical Association to develop a set of operating principles. All department heads were given the opportunity to be trained in the new system, supported by the project team.

Out of a team of 300 senior doctors, 246 are now using the new system. The trust has reported that in specialist areas where the system is working to capacity, the net benefit to the trust is approximately £360,000. The impact on patient care is clear – the trust reports that a backlog of 700 patients has been cleared since the system was implemented.

Transparency has been key to the team's approach to engagement. This has included sharing learning with colleagues and the wider NHS community.

Dave Travis, divisional manager, said: "The need for staff engagement was essential to realise that the new systems were bursting with opportunity. The communication process is key and we continue to use the real benefit examples to show others within the organisation how we have achieved success. We are also sharing our impacts with other trusts in the region who have had the system for a while and not yet implemented. The key to maintaining momentum is to ensure the project is aligned to other improvement projects, so the benefits can be maximised and transparent."

Project team of the year award

Winner

Belfast Health and Social Care Trust

Through implementing Allocate's HealthRoster and BankStaff solutions, the rostering team has streamlined the process for paying bank staff and has enhanced patient services by ensuring the right staff are in the right place, at the right time.

The initial rostering began in 2012 with version 9.5, but the organisation quickly moved to version 10. One of the biggest challenges that the trust faced when rolling out the products was to make sure that both the staff data and end users were ready for the change. This update required retraining of existing end users so that staff were comfortable with the new system.

Members of the rostering team provide information, advice and support to all end users and are responsible for teaching ward managers how to navigate and maintain the system. They are responsible for gathering data then building those specific individual ward and personnel requirements into HealthRoster.

The project has enhanced patient services by ensuring that staff are effectively deployed across the trust. Nurse-to-bed patient ratios have been revised through the system, increasing staff safety, and shifts have been streamlined to be European Working Time compliant.

Roisin McMahon, e-roster implementation manager, said: "We have seen that with improved fairness and equity amongst the staff, sickness levels have decreased. The culture of self-rostering has reduced and the sharing of good practice when enforcing governance issues, along with internal policies and protocols, has increased overall."

The dedication and commitment shown by the roster team, in such a small period of time, has enhanced patient services. The biggest impact has been the increase in safety levels. This has been achieved by meeting the patient demand within each area effectively. The new system means that the trust now has the right members of staff in the right place at the right time.

Following some changes to finance, the organisation required a bespoke solution to process electronic timesheets. Allocate provided the trust with a new interface that automatically processed wages. Everything that was input onto the BankStaff and HealthRoster systems by ward managers was extracted directly and automatically processed in the payroll system which is SAP.

This meant staff were now being paid accurately and on time. They had the transparency of seeing exactly what they worked and what was being claimed for them through the employee online system. Ward managers found that this new process freed up their time, so there was more time for patient care.

Throughout the process, the team worked together with a strong team ethos, meeting regularly to discuss any occurring issues and using clear, direct and positive communications. The team has now successfully established a fully functional bank department and more than 8,000 staff are being paid directly from the system.

Project team of the year award

Highly commended University Hospital Aintree NHS Foundation Trust

The trust has rolled out a number of software solutions that have so far delivered efficiency savings of £2.9 million, allowing the trust to reinvest in nurses and spend more time with patients.

SafeCare, HealthMedics Clinical Activity Management (CAM) for leave and payroll and eTimeClocks for biometric time have all been implemented to bring about more efficiency across the organisation.

One of the first projects the trust undertook was a major piece of work to redesign the nurse shift system. SafeCare is being developed to manage the requirements of additional duties overtime and bank usage. The nursing body has moved from the traditional working week because a high number of these historical working patterns had become obsolete. Flexible working patterns have been introduced instead, which has increased the efficiency and availability of the workforce.

The increase in the number of nurses per shift has meant that the ward managers can be released from the ward to fulfil managerial responsibilities. A survey taken several months after the change demonstrated increased staff morale, with most nurses feeling they had more time with their patients when in work and a better work-life balance.

The HealthMedics Clinical Activity Management software reviews the trust's theatre booking process and has supported improvements in

theatre use. The Medics Roster leave planning process has demonstrated a 33 per cent reduction in the number of steps required to complete a roster.

Efficiency savings are also being realised within estates and facilities. Following the implementation of software solution eTimeClocks, there has been an 80 per cent reduction in the time required to accurately record and manage resources.

As the new software has been installed across the organisation, it has been necessary for all the project team members to be trained to use the system so that they can provide support and advice.

The main benefit of the ongoing project is an increase in patient safety, as the software can be used to document where there are not enough nurses in an area to provide adequate patient care.

Leanne Gorvett, project coordinator, said: "The team has been great, working effectively to implement this three-year programme. Not only has the team supported the end user through implementation, but they've also worked hard to form steering groups for each stream of work. Improving efficiency in the trust and patient safety are two major goals for us, and I'm happy that through strong team work, we're on track for making the organisation a more effective place for both staff and patients."

Award for outstanding contribution by an individual

Winner

Lindsey Dobbin – Project Manager, Nursing Workforce and Education, South Eastern Health and Social Care Trust

Through implementing HealthRoster, Lindsey is saving time for staff and wards with rostering and reducing payroll errors. In turn, these improved efficiencies are creating more time for patient care.

Lindsey has led the implementation of HealthRoster across both the trust's acute and community services. This includes five hospitals, prison healthcare, emergency departments, mental health services and domiciliary care. Lindsey has needed to implement HealthRoster across complex staff groups and manual rotas and a wide range of working patterns and salary enhancements for the trust's 12,500 staff.

A key challenge for Lindsey was implementing the software for the domiciliary service, as it is particularly complex and she had no prior knowledge of its staff management systems. The service covers four sectors, 500 staff in 44 different teams, complex rotas that changed frequently and an out-of-hours service – all of which were being managed with paper rotas. She also faced resistance to change from this group as many of the managers were not IT literate. This also meant that more time for training was required.

Lindsey's knowledge and leadership skills have been instrumental in dealing with a variety of circumstances and challenges. She's dealt with resistance from the trade union staff groups and worked with them and HR to overcome difficulties. The radiology team has different salary enhancements and a very different working pattern, so workarounds had to be developed into the system.

Lindsey has forged great relationships with key stakeholders across the organisation, which have helped her deliver the changes. The IT team was also able to use her relationships to communicate details about delivering a new system for HR, payroll and travel and subsistence.

Sharon McRoberts, assistant director of nursing workforce and education, said: "Lindsey is not a nurse, however, her extensive knowledge means she is able to meet the needs of whatever staff group she is working with. Lindsey has inspired confidence in staff through skilled and consistent communications."

Lindsey's exceptional commitment, self-motivation and vision has brought about major benefits for the wards. There is now more transparency, increased fairness and equity for nursing staff. This has increased staff morale, reduced stress and reduced absenteeism. One ward sister commented that using the HealthRoster saved her four hours' work each month. The new electronic timesheets are also delivering time savings and reducing payroll errors.

The domiciliary care service has also shown significant improvements to efficiency with staffing. Patients have benefited from having the required numbers of staff on each shift with the skills and competencies necessary to deliver care.

The consolidation of BankStaff and HealthRoster has provided the trust with the full picture of its staffing. This means that unsafe working practices are avoided, such as working a day shift directly following night duty.

Award for outstanding contribution by an individual

Highly commended Louise Fitzsimons – HR Systems Manager, Homerton University Hospital NHS Foundation Trust

Louise has transformed the way her organisation uses Allocate Software's HealthRoster and BankStaff modules, removing many manual processes. This has helped the trust reduce bank and agency expenditure on its main acute wards by 3 per cent, as well as reducing the number of unfilled shifts.

Working closely with many stakeholders from across the organisation, Louise has successfully re-implemented HealthRoster and migrated from version 9.5 to version 10. During the re-implementation, there was focus on educating wards and departments on how to roster permanent staff more efficiently and how best to use contracted hours to reduce the temporary staffing spend.

The re-implementation has allowed the trust to move to paperless sickness reporting and has eradicated paper timesheets. This has reduced duplication and produced more robust and accurate reporting.

The BankStaff module was introduced for the bank staff team. Louise had to work very closely with the team and quickly become an expert in this field so that they felt the organisation was committed and confident about implementation.

Louise supported the team throughout the process, engaging in regular meetings to address concerns and questions and she helped them to map their current process against the new one. For the first time, the team could visualise how the new process would reduce and streamline what they were currently doing.

Following the successful completion of this project, the system now fully integrates with the roster so that duties can be appropriately allocated while ensuring that all rules are adhered to. The implementation of the system has also allowed the team to concentrate on filling the shifts that are harder to fill.

Gail Deane, head of workforce information and HR systems, said: "From the beginning, Louise has shown commitment and determination to successfully roll out these projects. We regularly receive feedback from users of the system, as well as from senior managers, on how knowledgeable, professional, conscientious and focused Louise is. She's a true asset to the organisation."

Throughout the process, Louise has provided continued support and motivation to the system users. The team is now more confident with using the system, and those who were not engaged previously now champion the system and speak regularly at project group meetings.

Allocate Awards 2015

Award for outstanding contribution by an individual

Highly commended Donna Mariner – Implementation Lead, Sherwood Forest Hospitals NHS Foundation Trust

Donna is the lead for delivering Allocate solutions and e-rostering across the trust. Her tenacious spirit and motivation means she has been able to negotiate and influence challenging situations and individuals. Donna is a great communicator and is always available to answer any questions that staff may have.

Donna joined the division leading on procurement of managed equipment service and an electronic theatre system. It was during this time that she volunteered for the Allocate implementation role, while recruiting for the implementation lead took place. After two failed attempts to recruit, Donna stepped up to the implementation lead role.

As lead, Donna is responsible for making sure data is gathered and cleansed before loading into the new systems. She then hands over to her team to train and engage stakeholders during implementation, providing support and expertise along the way. Donna has overall responsibility for reporting the benefits and progress and to the trust recovery team and workforce work stream.

Donna has worked with Allocate to implement HealthRoster, Clinical Activity Management (CAM), BankStaff and e-JobPlan plans in five months. The benefits and impact are already being realised across a number of finance streams and patient waiting times have been reduced. Using HealthRoster means that the correct skill mix and spread of nursing hours are used efficiently, which delivers safe patient care.

Dale Travis, divisional general manager, said: "Donna is extremely dedicated and self-motivated and often stays behind to ensure all deadlines are met. She has demonstrated clear leadership to her team; she is extremely credible. She keeps her team motivated and is often approached to assist with other workforce projects that may link into Allocate systems. I consider myself very lucky to have Donna leading this programme of work with the support of Allocate."

Award for improving working lives through technology

Winner

Kettering General Hospital NHS Foundation Trust

Implementing HealthAssure has helped the trust achieve significant time savings in delivering audits and reports, as well as a better standard of care for patients and increased staff engagement around ward performance.

Kettering General Hospital wanted to address the resource-intensive process of the collection and collation of data for reports and assurance. Audits have always been a lengthy, time-consuming manual process, with issues around accuracy and version control. The trust invested in HealthAssure, which offered a cost-effective solution for a system that staff were already confident with.

Bespoke frameworks have been developed by Allocate for the organisation's infection control and cleaning audits, but the trust needed an additional framework to be able to deliver assurance relating to compliance and performance indicators across a wide range of reporting criteria.

The trust added nurse sensitive indicators, quality assurance frameworks and central alerts (CAS) to the system to help meet the needs of a number of its objectives, including improving working lives, time to care and staff engagement.

By working innovatively and pushing the boundaries with the software, the trust has built a system that meets its needs. The bespoke dashboard enhances reporting by providing

quality data across a number of performance indicators that are visible and easily accessible. Not only has this reduced the burden of paper reporting for meetings, senior staff can also quickly access and interrogate data themselves so requests to managers have reduced.

The nurse sensitive indicator audit saves six hours per month, per department over the manual process it used to follow. That equates to 288 nursing hours released to care each month and more than 3,456 hours per year saved from doing this report manually. Managers also have more time to help support staff, making them feel more valued and improving their working life.

Monthly dashboards are shared and published on public notice boards on the wards. Because the dashboard is visible and the data is easy to access, staff have become more engaged in the ward's performance, often discussing how to improve if the performance dips. Staff take pride in the results, and improvements in patient safety and experience have been demonstrated.

Linda Cottingham, corporate information compliance and corporate projects manager, said: "Staff have more time in department to manage their teams, engage with service users and review ward activity and patient care. Staff morale has improved and they have a better understanding of the team's performance and what is required to improve."

Allocate Awards 2015

'Right people, right place, right time'
– award for balancing savings and safety

Winner

Leeds Teaching Hospitals NHS Trust

Over a six-month period, the project implementation team at Leeds Teaching Hospitals used Allocate's Clinical Activity Management (CAM) software to successfully make the transition from confusing and unreliable paper rosters to an electronic system. The team worked with dedication and perseverance and overcame high levels of initial resistance to change, eventually winning round even their most sceptical colleagues.

The team held open meetings for all staff members to demonstrate the benefits of the new system and encourage their colleagues to invest the time and effort needed for the design and implementation of a new system. They provided ongoing group and one-to-one training, developed specific user guides and held regular review meetings with all departments to help establish the new rostering system.

The new electronic rostering system has resulted in less use of agency doctors and greater continuity of care for patients. Operations are no longer being cancelled due to lack of anaesthetist cover because of a poorly planned roster. An extra 24 hours a week of direct clinical care has been achieved, equating to a saving of £800 a week that would have been paid as overtime, leading to one consultant roster coordinator stating they 'can now spend their time on the important things' rather than updating the roster.

Rachel Carroll, e-rostering project team leader, said: "We are now seeing a huge increase in getting the right staff in the right place at the right time, while ensuring cost savings."

**'Right people, right place, right time'
– award for balancing savings and safety**

Highly commended Cathy Brown – Quality Improvement Lead, Burton Hospitals NHS Foundation Trust

Using the data in HealthRoster enabled Cathy to assure her board that the wards were appropriately staffed in terms of nurse-to-patient ratio. Using this data has also allowed the director of nursing to look at whether the trust could safely reduce its nurse vacancy rate by using an assistant practitioner role, which in turn will help to reduce its deficit.

The trust is facing a series of issues that affect nurse staffing. As one of the original Keogh trusts, it is held to regular scrutiny both by regulatory bodies and in the local press. The trust recently had its second full Care Quality Commission inspection in 18 months and is in special measures. This is in part due to its financial position. Also within the last month, Monitor has informed the trust that it needs to reduce its predicted deficit for this financial year by 35 per cent.

In addition, the trust has a shortage of trained nurses and, due to the vacancy rate and high sickness levels, the trust spend on agency staff is unprecedented.

Cathy worked in conjunction with the paediatric team to develop multipliers for their area and implemented three census periods per day.

This showed that the ward had a deficit of nursing hours in the afternoon and a surplus at night. The ward is now putting together an organisational change document, to reduce staff on the night shift and introduce an afternoon/ twilight shift and an overnight on-call system. This will enable them to use current staff to improve patient safety and experience, while reducing costs.

Working closely with the e-rostering team and head nurses, Cathy reviewed roster production and temporary staff usage. A more robust 'confirm and challenge' process was brought in, which required one of the team to work collaboratively with senior nursing staff and the finance teams to streamline the roster approval process and authorisation for temporary staff requests. This resulted in improved staff morale on the wards and reduced sickness rates from 5.65 per cent to 4.29 per cent for registered nurses. This in turn has reduced the amount of shifts being filled by temporary staff by 5.5 per cent over the last six months.

Cathy, quality improvement lead, said:
"Reviewing staffing levels in conjunction with acuity and dependency is key to using the workforce more efficiently and reducing temporary staffing costs."

Award for collaborative working

Winner

University Hospitals of Morecambe Bay NHS Foundation Trust

Working in collaboration with private and third sector health and care organisations has enabled the trust to develop a proactive and innovative recruitment and retention strategy.

The organisation was finding it challenging to recruit hard-to-fill specialist roles in an increasingly competitive employment market and had difficulties resourcing existing staff across its services and locations. Working on retention and attracting new talent to the area was going to be key if it was to meet the high-volume demands of the service.

The trust recognised that attracting talent to south Cumbria was important, not just for the trust, but for other employers in the area as well. The organisation took the opportunity to build relationships with some major employers in the area, including BAE Systems, GlaxoSmithKline, Kimberley Clark, Siemens and Furness College.

The trust has invested heavily in recruitment activity. In partnership with the other employers, it developed a web portal and collaborated in an initiative called Choose South Cumbria, which included hosting a week-long virtual careers fair in May 2015.

Working across organisational boundaries, the NHS and with private and third sector organisations has been an excellent learning opportunity. It has enabled the trust to develop locally related solutions to improve the recruitment and retention of staff.

The trust now has a new values-based approach to recruitment and has developed an apprenticeship programme with three local colleges and the university. Once students have completed this successfully, they can apply to the trust for a nursing discipline degree or a suitable permanent role.

Promotion of the trust and its vacancies and careers, alongside other employers in the area, has been a key part of the recruitment and retention strategy, and has supported the significant increase in recruitment of new starters in the last year.

The trust has had 719 new starters since 2014/15, including 159 registered nurses and midwives, and 37 consultants have been recruited in the last 12 months.

Karmini McCann, workforce business partner, said: "Recruitment and retention is a key element of any organisation's strategy. Working in collaboration enables shared learning, it drives innovation and gives access to more resources, to attract and retain key talent. The workforce and organisational development team has led these developments and continues to develop them further."

Award for collaborative working

Highly commended Leicestershire Partnership NHS Trust

Collaborative working at the trust has achieved improvements in the flow of temporary hospital staff to the prisons and reduced the pressures on overstretched clinical staff.

The prison services need a constant flow of temporary staff so that there is the required level of clinical staff on each of the prison's wards at all times. Working in partnership with the trust's centralised staffing solutions (CSS) call centre team, the e-rostering team and the ward managers, Allocate software was used to help manage staff deployment and monitor agency use. It was also imperative that temporary staff had previous knowledge of how the wards work and have the appropriate prison clearances.

The team helped the prison ward managers to implement a better way of managing rostering through the use of HealthRoster and BankStaff. The e-rostering team trained all the ward managers on how to use HealthRoster and the CSS team was instructed on the new process. All agency staff were input into BankStaff so that they can be booked directly. Once an agency staff member has been booked by CSS, this would automatically appear in the HealthRoster on the wards.

The trust also collated information about temporary staff so they knew exactly who had the appropriate skills and experience to cover shifts on the wards. The CCS has detailed lists of agency staff and knows exactly which staff are available for deployment to the prisons.

Relationships have been built with the prison ward managers, communications and trust have improved and liaison is ongoing between all parties on a day-to-day basis. The team provides reassurance and support to the prison ward managers where necessary, which helps to maintain progress.

Joshua Kent, Leicestershire Partnership Trust rostering and resourcing lead, said: "Other trusts can learn from Leicester. The trust can manage all temporary staffing within one central system and, with the use of the Allocate systems, it can clearly log and manage bookings and staff and help reduce agency spend."

Award for bringing the patient to the centre of workforce planning and delivery

Winner

Central Manchester University Hospitals NHS Foundation Trust

Through the implementation of SafeCare, the trust can better respond to patients' needs and deliver improved patient care by accurately identifying shortfalls in skills or staffing hours on its wards.

The trust was already using HealthRoster, which was helping to plan staffing through planned demand. Its automated interface with NHS Professionals meant that any staffing shortfalls could be addressed through the use of flexible workers. SafeCare solution provided the final piece of the puzzle, clearly illustrating actual demand on a day-to-day basis that is automatically compared to the planned roster. SafeCare has the added ability to help the trust react to changes that require higher levels of staffing or a different skill mix. This means the organisation can be directly responsive to the needs of actual patients rather than just to an average patient intake based on biannual figures.

SafeCare was rolled out across 60 wards following a briefing and some training sessions. The wards began to input acuity and dependency census data into SafeCare-Live and input red flags against shifts. This information helps to identify the trends and fluctuations in the service and ensure that the right staff and skills are in place at all times.

So that the trust can maintain the data in real time, more than 1,000 new user profiles were created so that a number of staff in each area can maintain rosters and capture patient data and flag any risks or incidents.

The organisation had to ensure that the right governance and access levels were in place so that only matrons and above had an overview of patient information on the wards. Matrons are best placed to identify opportunities to move staff into areas where there might be a shortfall of hours or skills that would place patients at risk.

The trust has started to assess the types of incident that routinely occur across wards, or larger areas of work. That information is then used to proactively address any ongoing risks, such as moving staff where there is a continued high incidence of shortfall in registered nurse time.

The ability to record red flags means the trust is continually reviewing risks and incidents as they occur on a shift-by-shift basis. Each red flag is assigned an owner to identify the person responsible for action against that risk and who should follow the red flag through to its resolution.

Laura Herbert, HR programme manager, said: "The reports that are available within SafeCare will help us with our longer-term strategy, enabling more evidenced-based setting of establishments and underpinning use of bank and agency staff. Having the tools, not only to plan safe staffing levels, but also to validate these staffing levels against real-time information on the patients in the wards is invaluable."

Award for bringing the patient to the centre of workforce planning and delivery

Highly commended Derbyshire Community Health Services NHS Foundation Trust

Bringing together technology with an innovative workforce strategy has enabled the organisation to find cost savings through staffing while delivering high-quality patient care. The trust has developed a good understanding of its service from the data it collects, which is helping to continually improve patient care.

The trust launched its responsive workforce project because it recognised that the traditional model of workforce planning with clinical teams was no longer fit for service need. The project set about to build a sustainable, skilled and flexible workforce that was led by its responsive workforce clinical lead, who ensures that quality and governance is maintained.

Implementing SafeCare into the HealthRoster system was well received by staff, as this shows the needs of the patients and provides assurances that staffing levels are accurate based on patient acuity. The trust can plan around the needs of the patient and have the resources to achieve this while making cost savings.

The trust has worked hard to embed the model so it became a sustainable part of its culture. There was also a focus on recruitment to find staff who not only had the right skills for the post, but who are motivated to develop themselves and the service. The trust now has a team of highly skilled staff delivering an excellent standard of care.

Nicola Myronko, clinical lead responsive workforce, said: "No one person in the organisation can take credit for the change because everyone has been involved in testing the systems; analysing and working with feedback about the model, investing and committing to the development of the system and most importantly, learning and sharing the learning."

Feedback is showing a positive impact on patient care where the workforce responsive project is active. The dashboard data is also showing the trust that quality of care is improving all the time. The organisation is not as dependent on agency staff and it has a much clearer view of the actual workforce being used, giving assurances that the teams have the correct skills mix to meet the needs of the patients.



Allocate
Awards 2015

ALLOCATE AWARDS 2015

People at the heart of healthcare

Allocate Software
1 Church Road
Richmond
Greater London
TW9 2QE

+44 (0)20 7355 5555

www.allocatesoftware.com

@AllocatES