Improving workforce planning and intelligence

Leeds Teaching Hospitals NHS Trust

What was the aim?

The trust sought to develop a workforce system to provide ‘one version of the truth’, which was consistent and robust to support informed management decision-making.

What was the solution?

- Establishing an integrated, workforce systems team to provide consistent HR data (ESR and rostering) for correct payment of all 18,000 plus staff. The team works with finance colleagues to align figures across ESR and financial systems.
- Running workshops for relevant staff to contribute to the design of the new workforce systems team and processes. The work built on The Leeds Way (the trust’s values and behaviours) and the Leeds Improvement Methodology (based on Lean).
- Following discussions with trust stakeholders, establishing a new operational and management structure in the workforce systems team.
- Developing a comprehensive, easily accessible and up-to-date workforce information system to report HR metrics in one place, which can be accessed by managers across the trust.
- Developing a consistent planning process for the trust, to maximise the value of insight from business units and achieve consistency across finance, workforce, activity and business planning. A multidisciplinary group reviews all business cases to ensure they are robust and comprehensive.
• Working closely with the resourcing (recruitment) team to ensure that correct data is entered into ESR first time. This requires pulling information from different sources, including NHS Jobs and the trust’s bespoke onboarding system, into one place.
• Establishing a resourcing committee to help ensure the Board is sighted on key workforce metrics.

What were the challenges?

• Developing consistent data across the different systems, especially finance and workforce for which there are national datasets, coding structures and different definitions.
• Building capacity in the workforce systems team to develop effective reporting and support for the trust’s line managers while maintaining and improving business as usual processes.
• The lack of interoperability across key systems.
• Providing managers with usable information as they need it but not overloading them.
• Implementing changes while maintaining the information flow across departments to ensure staff are paid correctly and on time.
• Lack of visibility of the activity volumes of the different systems, which made capacity management difficult in terms of dedicating appropriate resources.
• Building an approach which engaged team members to identify issues and solutions.
• The large number of submitted forms with errors (up to 30%, and each requiring review, return, resubmission and reprocessing), unwarranted variation in processes and inefficiencies in key processes, especially the manual production of reports.
• Managers regarded the services well, but still had frustrations with key processes.

What were the results?

• Team members and service managers alike are positive about the approach, the latter particularly about the improvements being made and the increase in support for them.
• A new workforce systems team with capacity to help managers on a one-to-one basis.
• Four business-as-usual teams based on the trust’s business units. Managers now use one email address only to contact the team regardless of reason, (previously they used 12 generic email addresses, plus personal ones).
• Increasingly automated reporting processes have improved consistency and, together with form revision, have resulted in a drop in the error rate to around 5%. This has freed up time for the team to spend working with managers.
• New rosters and improved training for managers, including training videos on the trust’s YouTube channel.
• A SQL reporting services hub as a one stop for all workforce reporting, including business unit-specific reports and those on key areas such as mandatory training, PIN (professional registration), DBS check status, e-rostering and ESR data. This gives a ‘ward-to-board’ view of key workforce data which is always available to managers.
• The annual planning round works relatively smoothly with regular discussions through the year between the functions to ensure a consistent approach to information and data collection from the business units.

What were the learning points?

• To fully acknowledge the situation, while being clear about why there are variations and managing expectations.
• Engaging frontline staff is key to understanding their frustrations and ideas for improvement; they know their business better than anyone else.
• Line managers do not have the time to respond to emails informing them that new data is available. Also, the timing of publication will not always be when they need it – a ‘live’ data hub that they can access when they need information is key.
• Having visible performance data around the workforce systems team is key to identifying variations and opportunities to improve and build capacity.
• The lack of interoperability of all systems limits what the team can do, but using a SQL database is essential in pulling the data into one place.

Next steps and sustainability

• The new board reporting structure needs further work to refine data provision and agreed ways of working with finance colleagues in particular.
• The teams are working on a continuous improvement approach to review data, with the work environment full of visual data displays to support identification of issues and generation of improvement ideas. This is linked to the trust’s improvement method – The Leeds Improvement Methodology, based on Lean thinking.
• The workforce systems team has reviewed its internal meeting structure and developed a new communications approach, to help further develop how they work.
The development of a line manager portal to further improve data flows. This system will allow managers to track new starters through pre-employment checks and support engagement with them, and complete more automated forms.

Want to know more?

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