Achieving Operational Excellence:

Getting the data right

WHITEPAPER TWO

Introduction

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Thank you for downloading the latest whitepaper in our Achieving Operational Excellence workshop series. In this edition, we delve into the crucial topic of 'Getting the Data Right'. We will explore the significance of training, a topic briefly discussed in our initial workshop, and emphasise key aspects essential for a smooth transition post-implementation.

Ensuring a robust training system is in place and revisiting people's training needs are critical components of this process. Additionally, we will address compliance checks to ensure accuracy in rosters, system settings, and data quality through cleansing and roster reviews.

Furthermore, we will examine key performance indicators (KPIs) and provide recommendations for successfully engaging with your senior leadership team across organizational levels, shifts, ESR integration, and data flow.

We appreciate your ongoing interest and trust you will find this content valuable.

Best wishes,

Rob Green

1 The importance of training

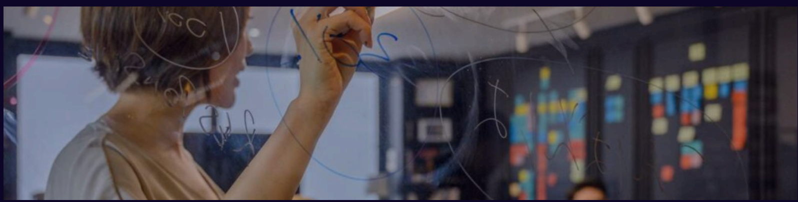
Training plays a critical role in the success of any system implementation. Its significance extends beyond the initial phase, becoming even more vital post-implementation, especially when employing the cascade training method and during subsequent system upgrades.

It is essential to maintain detailed training logs to monitor attendees of each session. This can be efficiently managed by incorporating e-rostering competencies into your scheduling system and generating reports to identify any training gaps.

The training environment significantly impacts learning outcomes, and there are several delivery methods to consider:

- **Traditional Classroom Setting:** A classic approach, although it might not be ideal for apprehensive participants.

- **Cascade (Train the Trainer):** A more effective method for larger-scale training initiatives.



- **One-on-One Sessions:** These are sessions that can be tailored to an individual's specific needs.

- **Drop-in Sessions:** These are convenient for busy clinical staff seeking flexible training opportunities.

Consider integrating training into established meetings or forums to disseminate updates or conduct refresher sessions related to system upgrades:

- **Junior Doctor Forum**
  Regular gatherings for junior doctors to discuss challenges, share experiences, and receive professional development opportunities.
- **Consultant Specialty Meetings**
  Convenings where consultants within specific medical specialities collaborate, strategise, and address clinical and administrative matters.
- **Ward Managers' Meetings**
  Sessions where ward managers coordinate operations, discuss patient care and implement protocols to optimise ward efficiency.

Centralising training materials is crucial for accessibility and consistency. Ensure they are regularly updated and available in various formats to cater to different learning preferences:

- **Classic Training Guides**
  Preferred by some staff members for comprehensive learning.
- **Quick Reference Guides**
  Tailored to specific professions for quick access to key information.
- **Training Videos**
  A visual and interactive option enhancing comprehension.

By emphasising robust training practices and adapting to diverse learning needs, organisations can optimise the adoption and utilisation of new systems effectively.

2 Checking Compliance

Always emphasise the critical importance of maintaining consistency and precision within your rostering system. It's essential to ask: Are incidents of unavailability accurately documented? Is the functionality for leave requests being utilised correctly? Are instances of sickness appropriately extended, or are they merely being duplicated, thus skewing data integrity?

Zebra's unavailability management tool offers intuitive navigation and robust reporting capabilities, pivotal for effective end-of-year leave planning. With the ability to generate detailed reports on employee entitlements and leveraging the notification system to prompt leave requests where gaps exist, managers can strategically plan leave without resorting to utilising bank and agency staff during peak periods, such as March.

For optimal end-of-year leave planning, we recommend commencing the process in December or early January. This timeline ensures timely communication for the publication of March rosters. It's imperative to assess whether areas are utilising the automated roster tool. If not, it's essential to delve into the reasons behind this choice.

Additionally, any feedback indicating underutilisation of the patient acuity tool due to data inaccuracies warrants investigation. Are staff inputting census data at the appropriate intervals? Is the ward data accurately configured within the system? Regular spot checks on rosters help verify the accuracy of recorded work hours against actual shifts worked, ensuring compliance across the board.

3 Data Cleansing and Roster Reviews

Continuing from compliance assessments, we recommend optimising efficiency by addressing areas where compliance struggles may occur. Our approach involves conducting comprehensive roster reviews and scrutinising flexible working agreements in identified problem areas. Through this process, we pinpoint training requirements and recommend further skill development initiatives.

Moreover, we underscore the significance of regular roster reviews as a cornerstone of organisational agility. We advocate for a structured cadence of reviews, ideally conducted every 4 to 6 months on a rolling basis. This ensures that rostering practices remain aligned with evolving operational needs and regulatory standards. We will delve into strategies for organising and executing these reviews effectively, maximising their impact on operational performance and compliance adherence.

4 KPIs and engaging your senior team

Effective post-implementation strategies emphasise the creation of a robust senior leadership team comprising professionals with specific roles such as Medical Directors, Assistant Directors of Nursing, and Lead AHPs. It is imperative that key performance indicator (KPI) data is regularly reported to this senior team on a monthly basis.

Likewise, it is essential to conduct monthly meetings with rota coordinators to review KPI data comprehensively. These meetings serve as vital forums for discussing strategies for improvement wherever feasible.

Central to this process is the identification of pertinent KPIs aligned with the objectives outlined in the business case, and in accordance with guidance from organisations such as the National Health Service England (NHSE). The integration of routine KPI discussions into board meetings, alongside targeted engagements with profession-specific senior leaders, ensures a cohesive approach towards monitoring and enhancing performance across the organisation.