

CASE STUDY

Residential and Outreach Services

Background

This charitable organisation provide care for HIV, AIDS and Hep C sufferers across Scotland. The scope of the project was to work with one of their residential facilities and also their community outreach team across the city as they provide care and support to a range of service users with a range of needs.

Prior to the project, there was no way of measuring productivity, and the management tools within the organisation provided no real assurance on performance, quality or sustainability.

Meridian had previously helped to raise money and provide support for the organisation and after discussion with the Chief Executive agreed to go in to conduct an analysis focusing around the productivity of those community teams and the residential facility; number of contacts with service users, impact on waiting times, variances across sectors, discharge protocols, length of stay and care packages.

Study Findings

Meridian conducted an analysis over a 3 week period starting in August 2015. This consisted of 36 resource days, enabling us to have the time on the ground to perform:

- 4 Day in the Life Studies
- 17 Productive Labour Utilisation Studies
- 3 Outreach Caseloads
- Historic Data & LOS Data Analysis
- A Detailed Roster Analysis
- Management Control System Analysis

The analysis highlighted some areas that required focus including;

- Less than 23% of Outreach staff time being spent in contact with service users
- Less than 2 contacts per day in community
- No visibility of planned work
- No expectations or targets being set across outreach teams
- Inaccurate recording of bed occupancy
- No accurate admission or discharge planning
- No management reports or reporting framework

Meridian proposed to install a suite of management reports allowing the monitoring of costs and productivity at every level by the Senior

Management Team highlighting variances to targets as they occur and install a resource planning tool for all community and residential teams to directly link activity to staff.

Project

Meridian embarked upon a 14-week programme to address all of the points from the analysis.

Working with all levels of management through workshop sessions, they set and agreed level of contacts along with targets and norms for types of visits and interventions in the community. Service user acuity was categorised into RAG ratings and clear metrics were established to gauge performance on admission and discharge.

A new management control system was developed and installed across all teams, meaning that for the first time productivity and utilisation could be measured across the service. Meridian quickly agreed and installed:

- Dashboard Reports at a team and individual level across the service which allowed managers to see clearly how the team, and its individuals, were performing against the agreed targets.
- The Management Report at Senior Management level before installing the reporting philosophy down the organisation;
- A revised meeting structure to make sure the meetings were focussed on the proactive management of activities required to ensure service users were discharged on time and that potential beds were planned for to ensure a sustained level of occupancy.

An electronic work allocation and work scheduling system was installed to work alongside the database already in existence which provides all levels of management the assurance on how many contacts each team will carry out, how many hours are required carry out the work in linking demand to capacity. The actual activity is also shown in order to review the plan against actual and necessary adjustments can take place.

Meetings were reviewed and redesigned to ensure that time being spent in meetings was productive and targeted towards understanding variances against the agreed plans.

- Weekly Team Meetings were installed with Team and Service Managers to review the planned work in community in relation to the set targets. Management of the bed state was also addressed to ensure that appropriate plans were put in place to best deal with future admissions and discharges.



- Daily meetings within the residential facility were restructured to measure performance against the plan, helping to ensure that service users were receiving the appropriate quality of care in order to facilitate their discharge.

Reports were produced to underpin the whole process and ensure that staff received qualitative and quantitative feedback in relation to the amount of information that was being captured:

- Staff training was presented so that there is a clear understanding of what level each member of staff is at
- Service user feedback, previously recorded in handwritten forms, is now recorded into a database and fed back to management to better tailor the services and treatments being provided
- Bed state reports are now produced live and assist management in making timely and informed decision

The entire process was underpinned by workshops and 1:1 sessions with all staff to ensure that they developed and agreed each step of the new management control system; without this proactive involvement from all the ownership required to perpetuate the changes would not have been present.

Meridian also deployed their bespoke work scheduling system Delego into the organisation which allows the community outreach team to plan and schedule episodes of care systematically for the service users and then allocate work out to the teams to ensure that they are best using their capacity productively. The manager of the outreach service has found this of great use as it affords him the ability to manage the team without having to pull everyone in to one location. This frees up staff time to spend more time face-to-face with service users.

Results

The main benefits in the organisation were to put a spotlight on to what has previously not been a priority such as productivity and resource planning according to the needs rather than the budget allocated.

Management now have a clear picture of how the service is performing and have control over the capacity and demand of their service.

Information which had previously been held in a database, and inaccessible to most, is now presented back on a daily and weekly basis to show how occupancy, admissions, discharges and care packages are comparing against expectations.

Meetings have been redesigned to maximise the time allocated and compare and contrast facts and figures which provides a level of assurance to the management and to the Board that was not previously evident.

Staff have positively engaged in the entire process and are now aware of, and managing by, exception and against robust system information

enabling them to provide the most efficient and productive level of quality care for their service users.

Service users' feedback is now being electronically presented back to the management and being discussed at weekly meeting to ensure that the service is catering for its users in the best way possible.

A few weeks after the completion of the 14 week programme, the organisation were inspected and received their best ever feedback from the Care Commission following the project and Meridian's work with the organisation was highlighted as a major reason why.

Contact Us

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Meridian Productivity was established 1996, and has been extensively involved in the Healthcare industry across the United Kingdom, Republic of Ireland, Holland, Belgium, Spain and the Czech Republic. Meridian assists clients across the Healthcare environment (private and public) in achieving improved operating efficiencies and performance, through the development of bespoke management and behavioural processes. These processes are all designed and implemented to ensure that our client organisation can be assured of returning the best performance on the resources applied.

We work with about 20 to 25 organisations a year, both in the public and private sectors, helping them to reduce their operating costs, improve their productivity and provide value for money.

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