

CASE STUDY

Community Services

Background

This midland-based NHS Trust operated at a low productivity level within their District Nursing, Therapy, Integrated Care Team and Older Adult Mental Health Service. Due to unsatisfactory performance levels and unbalanced workload across the teams, Meridian were invited to carry out an analysis after a successful project in Adult Mental Health Services. The Trust wanted to focus on increasing the productivity by taking out surplus resource.

Previously there was poor control over resources and capacity need was based on historic demand and previously agreed team sizes. There were no tools to enable the organisation to control and balance the demand and capacity on a higher level, within the teams or on a Trust level.

Meridian was invited by the Executive team to conduct an analysis of the above four services, specifically looking at the amount of productive time per worked day, balance across the teams and the current demand.

Study Findings

Meridian expended 70 resource days on an analysis in October 2014. The analysis identified the following;

- Lack of uniform capacity and demand review
- Existing methods of work allocation based on the total work for the day and not total capacity to carry out the work, resulting in poorly planned days
- No reasonable targets set by level of staff or type of professional, no visit duration specification (qualitative or quantitative)
- No evidence of a reporting system with review at all levels
- No forecasting methods based on demand and staff capacity

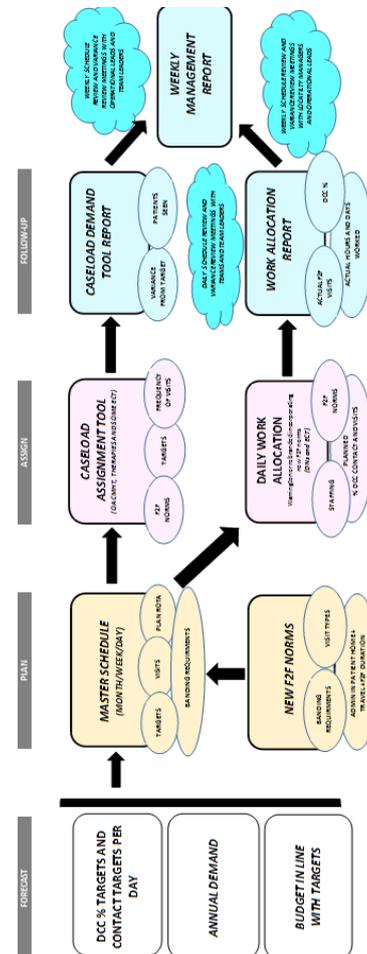
Meridian proposed a 20 week long programme, phasing the approach service by service. The proposal contained: agreeing and introducing reasonable targets or patient facing time, specification regarding the type and duration of the contacts performed by each professional. It

was proposed that working with all management levels within the organisation Meridian will help the Trust in reducing the cost of running the service by developing and implementing tools and behaviours with the managers, which will enable them to control the demand and resources based on fact.

Project

The programme started in November 2014 and finished in March 2015.

The development of the new system elements were achieved through a combination of workshops and weekly one-on-one coaching sessions with each of the 100 managers. This ensured the project was able to complete all of the deliverables within the planned time scale by ensuring all levels of management are involved in creating the new management control system.



The targets for patient facing time and reasonable visit duration targets were developed and agreed with the managers based on the overall target set by the Trust. This was agreed and signed off by all involved.

The next stage was establishing the true demand for the services by capturing the types of visits by type of staff and by day. This helped to establish a reasonable forecasting method. Based on the agreed parameters the allocation tools were developed and implemented to allow the managers to allocate work appropriately and efficiently (it only took about 20 minutes to allocate work to big teams every day).

The behavioural element was to ensure the managers see where the inefficiencies lie and where they have surplus capacity. Teams with shortage of capacity were able to show this to the management while teams with a surplus were also highlighting their inefficiencies. In order to enable the management to make factual decisions, a review process was put in place. Based on the results of forecasting, planning and on-the-day allocation the managers were able to make decisions to move resources between teams.

This process took two turns – an overall rightsizing of the service and a smaller, daily/weekly process of balancing resources based on daily changes to the forecast.

The Trust was able to remove resources from the areas of scope by removing vacancies and moving staff to other areas within the Trust where the resources were needed.

Results

- Significant improvement of work allocation process as well as understanding of how busy the teams and individuals are

Weekly Productivity Summary		Health Centre				SW
Staff Utilisation		Hours				Target hours
Target Plan	75%	Substantive	105.5	Target hours	142.5	
Actual	33%	Bank	84.5	Plan	61.8	
Variance (from target)	-5%	Agency	0	Actual	132.4	
		Peripatitive	0			
		TOTAL available hours	190.0	Variance from target	-10.1	

- The new management control system enabled the Trust to understand their demand better and to control the incoming work
- A significant improvement in productivity – between 15% and 50% of improvement (across the four services) in the face to face duration and number of contacts per day
- A reduction of 20% of WTEs equating to £2,33m saving.

Contact Us

For more information on Meridian’s work in healthcare, please contact:

James Quinn
 Tel. +44 (0) 7971 400428
 quinn@meridianpl.co.uk

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.

Find out how Meridian can benefit your organisation.

Contact us today:

T: +44 (0) 131 625 8500
 E: info@meridianpl.co.uk
 W: www.meridianproductivity.

