

## CASE STUDY

### Home-Based Treatment Teams Project Improvement Programme

#### Background

Meridian Productivity was brought in by the client to assist the Home-Based Treatment (HBT) crisis team as it was an integral team involved in the patient flow through the organisation.

#### Study Findings

Meridian conducted a two-week analysis in which 14 Day in the Life Of studies and 16 structured interviews with management were completed. The historical data was also analysed. The findings concluded that there was low face-to-face contact with service users and inconsistency in the definition of the service and its role in the organisation.

The face to face contact as observed and recorded by the Meridian team was an average of 17% of the total time in work. In an average day, this was only 1.5 hours, of which face-to-face time is their main activity.

The analysis also showed a lack of control over activity, expectation, and performance. The management team had no accurate way of planning their team's day, nor how to review the performance of the team to amend productivity.

Meridian proposed a 19-week project to the client with the overall goal of increasing face-to-face contact with

service users across the teams from 17% to 33% of the total time in work. To achieve this goal, the Meridian team worked with the HBT management team to develop and install new ways of working, such as:

- Creation of a demand and capacity tool to measure productivity
- Implementation of a more accurate and detailed planning system
- Daily and weekly review meetings
- Flow chart of tasks for additional capacity
- Bank and agency controls
- Management and Leadership Workshops to sustain project benefits and support future iterations of the improvement programme.

#### Project

After the goals and norms had been agreed upon by all stakeholders, the Meridian team created a demand and capacity tool that gave management a clearer understanding of the capacity within their teams. The tool highlighted which individuals were planning their activity to target, and which weren't. Managers now had the information required to compare the actual activity to their plan - and



follow up on any variances on an individual level.

To promote transparency and cement this new review system, Meridian set up a daily “Huddle” conference call, in which the managers from each team would discuss their planned versus actual activity and the variances they had found. By having all 6 sites on the call, it reinforced the idea that these changes were permanent.

In conjunction with this, Meridian introduced a new way of working through the allocation and planning for the next day of visits. By implementing the use of an electronic diary, the team and management were able to utilise their capacity better. This method of planning effectively reduced previous losses of time, such as double booking of practitioners, imbalance of visits per practitioner and planning out travel routes between patients.

Another positive of the planner was that it gave supervisors a chance to follow up with the team during the day. By having a clearly laid out plan, supervisors had the information needed to redistribute work as new challenges and emergencies presented themselves.

Once these two controls were in place, it was essential to making sure that there were back up assignments and tasks for the employees to take on when capacity was identified. The Meridian team worked with HBT management to ensure that each role in the team had back up tasks that would be turned to in times of low demand. This resulted in a steady reduction in backlog tasks and an elimination of significant productivity variances.

Another major element of this project was to put in controls to help regulate spending on unnecessary bank and agency shifts. This complemented the tools that had already been implemented, as managers could now calculate the number of additional hours needed through the capacity and demand tool. The application for additional spending would not be approved without this calculation. By enforcing this control, significant financial savings were achieved.

Meridian also embedded perpetuation processes throughout the teams. Daily, weekly, and monthly meetings were created to embed the planned vs actual follow up philosophy needed to have a successful management control system. The behavioural change that has been supported by the workshops run by Meridian has meant that managers are now able to answer the question, “what is your plan for tomorrow” thoughtfully and knowledgeably.

## Results

The processes and tools that Meridian implemented gave the management of the HBT teams better control over the governance of the HBT teams. It also gave management daily visibility of individual and team performance. They were able to deal with issues and crises as they arose and adapt their daily plan effortlessly.

Overall, the project was a great success and resulted in savings of £187,729 during the period of the project. The HBT teams now have an effective management control system that can adapt to the changing environment of a crisis team and has helped increase the average face-to-face percentage to 34%.



The main results of the programme were:

- £187,729 savings during the project
- 49% improvement in time between referral and acceptance
- 42% improvement in length of stay
- Ability to adapt to increases in demand - especially during seasonal changes
- Adaptable management control processes that highlight demand and capacity in advance.
- Effective bank and agency control process

### Covid-19

As further validation of the effectiveness of the project, these tools were essential as the Covid-19 crisis developed. Using the tools and controls, the teams were more aware of their demand and capacity than before. As colleagues and patients were forced to self-isolate, managers and supervisors were able to adapt to the changing environment backed with the knowledge gained from the system.

The organisation and Meridian are exploring further work opportunities with the other crisis teams in the Trust.

### Contact Us

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

James Quinn  
Tel. +44 (0) 7971 400423  
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.com

