Making effective use of bank and agency staff

North Tees and Hartlepool NHS Foundation Trust introduced a Bank Staff Management System (BSMS) to ensure that appropriately skilled and qualified temporary staff are allocated bank duties, to minimise clinical risks and control agency costs and spend. This has achieved savings of £562,338 and reduced the trust's reliance on temporary staffing solutions.

High impact change 1:
Increase understanding of the issue

The trust recognised a need to set appropriate staffing establishments and ensure that staff understood patient needs and clinical pathways. Reducing its reliance on temporary staffing solutions would help to ensure patient safety and quality of experience. It would also contribute to the effectiveness of clinical, operational and financial outcomes.

What we did:

With an e-rostering system already in place, the next stage was to utilise the system further by rolling out the Bank Staff Management System (BSMS) to manage all staff bank requirements.

Before an electronic bank system was introduced, the bank office was purely paper-based, resulting in inefficient use of resources and ineffective management of processes.

We reviewed the current system and found that:

- requests were made by telephone/e-mail leading to inconsistencies
- it was not possible to determine if the request was within budget
- it was not possible to determine if resources were available from another area across the trust
- no reasons were recorded for the why the requests were made
- no authorised 'requester' list was available
- there were 257 bank staff but the trust was still unable to cover shifts and therefore utilised agency staff.

High impact change 2:
Manage the process and take control

We wanted to ensure that appropriately skilled and qualified temporary staff were allocated to bank duties, to minimise clinical risks, and control agency costs and spend.

What we did:

The trust introduced the BSMS across all areas utilising the trust's e-rostering system (Healthroster) to manage all staff bank requirements.

This gave us the ability to:

- ensure all budgets and templates were balanced
- highlight where staff could be effectively redeployed across the trust due to under-demand
- enable greater transparency of where and why agency staff were being used
- streamline staff requests
- review the shift request policy to ensure that agency staff were only used when absolutely required
- enhance reporting and analysis of bank staff use to support future staff planning.

High impact change 3:
Manage your workforce, establish a sustainable supply

Using the electronic rostering system allowed the delivery of new, improved functionality and usability. It empowered staff and enabled them to manage their availability and nominate themselves for shifts.

What we did:

We reviewed policies and procedures for requesting and utilising temporary staffing and 'requesting rules and authorities' to the new system. Requests were only accepted if requested through BSMS and met the requesting rules. For example:

- requests were only accepted by senior staff (Band 5+/take charge competency)
- shifts could only be requested if a vacant duty was available
- 'specials' requests in addition to the basic ward requirement (when no ward vacant duty present)
- review of bank staff availability and work record (<6 months).

Following these reviews and full implementation of the BSMS, the total number of requests, bank and agency fills, and 'specials' requests were monitored on a weekly basis.

Several other reviews and subsequent processes were introduced to further control requests and improve supply.

Results and next steps:

Comparing the April 2010 to January 2011 position with the same period in the previous year, the trust has achieved savings of £562,338 which comprises of bank (£42,752), agency (£244,692) and overtime spend (£274,894). The total number of temporary staffing requests now average 135, a reduction of 42 from September 2009. Bank fill is 66 per cent, an increase of 30 per cent, and agency fill is 0, a 100% reduction.

Other benefits have included:

- administrative processes have been automated and linked with the Electronic Staff Record, HR Gateway and Payroll
- the process for ward managers has been simplified, saving on staff resource as well as reducing clerical errors

- improved monitoring of realistic and actual gaps in current service
- one complete and accurate clinical governance record
- real-time operational data (unavailability, sickness and absence data) to aid future planning and analysis
- bank shifts no longer allocated when bank person is substantively sick.

Using the e-rostering solution for bank staff management has enabled the trust to more effectively manage its temporary staffing without the need for a dedicated office or workforce to manage it.

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Case study: North Tees and Hartlepool NHS Foundation Trust