Streamlining in the North West – a summary of achievements

The programme was established to enable the smooth movement of staff from one NHS employer to another. Through effective collaboration over a three-year period the North West programme has made significant progress in achieving streamlined processes across recruitment, occupational health, training and beyond.

The North West (NW) workforce streamlining programme was formally established in April 2016 and ran for three years to March 2019. Supported by Health Education England (across the North) and hosted by East Cheshire NHS Trust on their behalf, the programme office arrangements (PMO) were part funded by HEE and equal trust contributions on a sliding scale model, ending in a 50 per cent split for its final year.

The North West region covers an extensive geographical area and has a large and diverse number of trusts. The programme and its programme office support arrangements (streamlining PMO) were shaped around three sub-regional areas of the NW, where networking among human resources, workforce and organisational development directors was already strong:

- Cheshire and Merseyside
- Cumbria and Lancashire
- Greater Manchester

How did it operate?

- A NW strategic programme board provided strategic direction throughout.
- A HRD lead from each of the sub-regions represented their area on the board and led the programme locally.
- 41 NHS trusts signed a memorandum of understanding to commit to participate in and part-fund the PMO, and to work collaboratively to achieve the high level aims of the programme
- All 11 Higher Education Institutes in the region and several other organisations were also actively involved and worked collaboratively to meet the aims for specific groups, such as students on healthcare programmes.

Programme objectives

The vision for the programme was to enable the smooth movement of staff from one NHS employer to another within the region and the wider NHS, and in line with the national streamlining. The national vision at the time was to have;

'An agile, flexible workforce that can move easily beyond organisational boundaries to deliver effective services for the population they serve and ensure maximum career opportunities. With a greater emphasis on place-based care and services and systems rather than individual organisations, we support the standardisation of HR employment practices, processes and systems that support and enable this. Changes must deliver a better staff experience, reduce duplication and be more efficient and effective.'

The high level aims of the NW programme were to:

- reduce the time to hire
- reduce unnecessary staff time spent on statutory and mandatory training
- improve staff satisfaction with the recruitment and induction process
- release administration time and costs as a result of standardisation and reduction in duplication.

Core workstreams

The programme focused on three core workstreams which included recruitment, training and occupational health. The specific deliverables for two of the three workstreams (recruitment and occupational health) changed over the life of the programme due to barriers faced when trying to implement the original deliverables, which stipulated the use of ESR and the IAT, as well as interfaces with other third-party systems.

The deliverables were updated to reflect what was more practical and what would still result in the aims of the programme being achieved, by removing any requirement to use specific systems to transfer the data required to streamline. This was fundamental to achieving in these two workstreams. The NW will work towards the long-term solutions and use of the national systems for this in the future.

> **"If we had stuck rigidly to core milestones we would have marked them as non-deliverable. Instead, we changed them to what we could achieve and used our influence as a large regional programme to escalate and help resolve the issues.**
>
> Emma Turner, Programme Manager, North West Streamlining Team

The sub-regions also had three non-core workstreams, which focused on local priorities and streamlining in areas the stakeholders themselves proposed, as outlined below:

Cheshire & Merseyside	Cumbria & Lancashire	Greater Manchester
Policy Review Engagement Partnership (PREP)	Policy Group – which has now become the Contract Refresh group	Policy Alignment Group
Systems Group	Establishment Control Group	Dementia Task & Finish Group
Medical Staffing Group	Careers and Engagement Group	Prevention and Management of Violence and Aggression (PMVA) Task & Finish Group.

> **"When we were looking at whether we should support areas to have additional local priorities, we knew it was a risk to delivering on the core areas, and we hadn't estimated benefits against them. But, we also knew that supporting these local priorities would be key to getting local buy-in. Hopefully this non-core activity will inspire a wide range of diverse work in other regions, under the streamlining banner."**
>
> Emma Turner, Programme Manager, North West Streamlining Team

Achievements against the core deliverables

Recruitment - Factual references (FR) implementation

- **98 per cent of (37/38) trusts have met the deliverable by moving to, or being in the process of moving to, requesting factual references in any system.**
- 79 per cent of trusts (30/38) have met the deliverable and made the move to factual references.
- 30 per cent of trusts (11/38) have gone beyond this and delivered against the original milestone by making the full move to factual references via IAT.
- 92 per cent of trusts (36 of 38) are no longer, or are in the process of moving away from, also requesting subjective references.

Training – Core Skills Training Framework (CSTF) alignment benefits realised
- 100 per cent of trusts (38/38) are using, or in progress towards using, the CSTF competences
- 100 per cent of trusts (38/38) are recording, or in progress towards recording CSTF competencies in ESR. One trust partially only.
- 100 per cent of trusts (38/38) are sharing, or in the process of sharing CSTF competencies via IAT. One trust partially only.
- 100 per cent of trusts (38/38) are accepting CSTF competences via IAT.
- **92% of trusts (35/38) have met the deliverable by aligning to the CSTF. Recording CSTF competencies in ESR, transferring and accepting CSTF competencies and most importantly taking, or are in the process of taking, the necessary steps to ensure staff are not repeating CSTF training.**

Training – Alignment to nationally recommended CSTF refresher periods

- 100 per cent of trusts (38/38) have refresher periods that are aligned or partially aligned to those nationally recommended in the CSTF.
- **47 per cent of trusts (18/38) have fully met the deliverable by ensuring they are fully aligned to the refresher periods recommended in the CSTF**.
- 53 per cent of trusts (20/38) have partially met the deliverable by being partially aligned to the nationally recommended refresher periods.

Occupational Health – Interim process for sharing immunisations implementation

- 100 per cent of trusts (38/38) have implemented, or are in the process of implementing the interim process for transferring immunisations, one trust only partially.
- **92 per cent of trusts (35/38) have met the deliverable and have implemented the interim process for transferring.**
- 100 per cent of trusts (38/38) have implemented a secure e-mail address to ensure the transfer is safe.
- 100 per cent of trusts (38/38) have a process, or are putting a process is place for gaining consent for from the new starter.

Top Tips

- Strong local leadership and ownership for the programme combined with a PMO to support these busy leaders in driving the agenda forward is key to success. Expect those leaders to change, have deputies and successors ready to pick up the mantal.
- Expect the unexpected …. listen to stakeholder challanges and be flexible in supporting them to meet their objectives.
- Engage stakeholders in both the principles and the more detailed practicalities of the change – they need time together to understand and agree collectively to what and how they implement.
- Use any existing networks you can but create new ones where needed, people will make this change happen and they need the time and space to focus on it.

Further information

Please visit the NHS Employers Streamlining Resource Hub to access:

- A short video in which stakeholders give an overview of the programme and its successes.
- An end programme report with further details on benefits, success factors and learning as well as sustainability plans for each of the three sub regions.
- A series of success stories.
- Signposting to further help and support following the PMO ceasing on 31.03.2019.