



Sussex Partnership
NHS Foundation Trust

How a mental health NHS Trust is using RLDatix's Rostering Solutions to ensure its staff have a good work/life balance



Summary

Sussex Partnership NHS Foundation Trust provides mental health and learning disability services in people's homes, specialist clinics, hospitals and GP surgeries. It provides a wide range of services for children, young people and adults of all ages, many provided in partnership and over a large geographical area. This remit can make staff rostering a challenge and, when combined with a lack of funding in mental health and a national shortage of qualified staff, has meant that the Trust must look carefully at staffing. The Trust wanted to be able to manage its rosters efficiently and effectively, but in a way that supported its staff in finding a good work/life balance. By using RLDatix's Rostering Solutions to address its needs, the Trust has been able to better ensure workforce skills match deployment whilst at the same time improving work/life balance.

Using RLDatix Pathways to support the efficient utilisation of the system

The Trust decided to start with a pilot ward to use the auto-rostering function in Optima. Tessa Chapman was the HR project manager in charge of deploying the new software. Culturally autorostering had acquired a bad reputation which meant one of the challenges Tessa faced was getting staff on board. She felt it was essential to ensure the initial set up was the best it could be. So, with support from RLDatix, Tessa began working through the RLDatix pathway documents, first focusing on auto-rostering for the Trust in a pilot ward.

Another challenge for Tessa was that managers did not feel that they had enough time to make auto-rostering a priority. As a result, support from Tessa and the staff at RLDatix was an important part of making them self-sufficient so they could not only check through their rosters but also get to a place where SafeCare could be deployed.

To this end, the Tessa encouraged the ward manager to engage with the new system through the creation of process notes to facilitate its use and weekly one-hour calls to identify any issues. Tessa also made sure the HR team used Loop themselves to request working days, days off and annual leave so they knew how the system worked.

Training across a large geographical area

Training has also taken place, largely remotely and over Skype due in part to the Trust's large geographical range with clusters of wards in different locations, but also because of the restrictions imposed by Covid-19. However, to compensate, the wards hold review sessions where staff can bring up any queries which are fed back to the HR project manager and RLDatix. This helps to provide support, ensures the system is set up properly, dispels any myths regarding autorostering and gains engagement across the Trust.

These ward-based tactics have paved the way for the successful implementation of auto-rostering to be rolled out to the rest of the Trust. Optima is now used by all wards, inpatient units and out-of-hours teams, with e-timesheets used for static teams.

Tessa says: **"Nearly everyone is now using Optima, and the Trust is in a good position to get staff to use the system in a way that ensures they get the most out of it."**

Creating a system that promotes a work/life balance for staff

For staff, the introduction of Optima has meant employees can plan their shifts to ensure they have a better work/life balance. Staff can see where vacant shifts are so that they can put in requests for working days, days off and annual or study leave. The advantage of auto-rostering over manual rostering in terms of work/life balance is that no one can take too many weekends or work too many hours in a certain period. It ensures they use their contracted hours within a set time period and everyone gets a fair and good working pattern out of their rosters.

Tessa says: **"Using auto roster ensures you are not breaking the rules. When you're doing it manually you might think you have made an effective and efficient roster, but it's not always the case."** Tessa believes the majority of staff now understand why there are certain parameters in place and can see the bigger picture that autorostering makes shift patterns fair for everyone.

There have been benefits for the Trust as a whole too. They are working towards the majority of wards areas using auto-rostering to support not only the effective management of staffing, but also to ensure everything is signed off in plenty of time enabling timely allocation of shift vacancies to the bank to support cutting down on agency spend.

With Optima now in place, the trust is looking to bring in SafeCare to the wards to help with patient acuity. By reviewing what rosters are telling ward managers and

looking at the reports generated, it will be possible to deploy effective staffing dependent on varying patient need.

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Tessa Chapman,
Rostering Manager,
eRoster Manager and RLDatix Project Lead,
Sussex Partnership NHS Foundation Trust

Making a positive trust-wide impact

The implementation of RLDatix's Rostering Solutions has had a Trust-wide impact as any change in staffing management requires Operational, HR and Finance teams to come on board too. Autorostering will give more responsibility and accountability back to the wards and increased engagement with the Assistant Chief Operating Officer. Meetings between the Assistant COO and individual wards now regularly take place. This assists the Trust in gathering data and insight on safe staffing and roster statistics as well as pre-empting potential workforce issues.

Tessa has also been working with the Deputy HR Director, who has been very enthusiastic and supportive of the project as it has benefited her work on the Working Time Directive. Together they are looking at using the system to set up notifications so that Working Time Directive breaks or violations will be prevented and reduced.

Likewise, the Finance team has also been able to use insight reports to create demand templates to determine staffing levels. Manual rostering had previously led to incidences of over staffing or contracted hours being under or over used. Now using insight reports they can ensure staffing is matched to demand reducing the need for agency staff or overtime.

