



BOLTON NHS FOUNDATION TRUST

A WORKFORCE STRATEGY TO IMPROVE STAFF ENGAGEMENT

SUMMARY

Bolton NHS Foundation Trust's long-term aim, by 2016, is to match the best integrated care organisations internationally for quality and efficiency of services. In order to achieve this vision the Trust has employed a deliberate strategy over the last five years that focuses upon harnessing staff engagement and motivation to create a culture of improvement. In essence staff engagement costs nothing. It is a way of being that engenders loyalty, motivation and the release of discretionary effort. In healthcare organisations it has particular significance as there are strong associations with the values of staff who identify with and want to contribute to and improve patients' experience.

Bolton NHS FT has been able to redefine staff engagement in a way that makes most sense for the Trust: *"engagement is the quality of the day-to-day experience that employees have with their line manager"* and for the first time it has been able to diagnose and treat disengagement, with emphasis upon moving away from autocratic leadership styles.

The Trust's innovative engagement strategy has been supported by the development of the Bolton Improving Care System (BICS) and lean processes as well as by a comprehensive leadership development programme involving managers and healthcare professionals. Throughout its journey the Trust has had to demonstrate its ability to respond flexibly and positively in an ever-changing NHS landscape where major NHS reform are creating new economic environments, workforce and service uncertainties. Despite these major challenges Bolton NHS FT has achieved

higher than average staff survey results and an increase in engagement scores as measured by 'Staff Temperature Checks'.

KEY OUTCOMES

- **Staff engagement Scores** – Development of "Staff Temperature Checks" to measure ongoing progress on a quarterly basis allows engagement to be better monitored. Such scores rose from 3.66 in 2010 to 3.69 in 2011, which is above the national average of 3.62. (see 'How it Works' for more information and Appendix 2 for the Staff Temperature Check questionnaire)
- **Staff Survey Results** - the 2011 NHS Staff Survey results were outstanding, demonstrating that despite undergoing a major organisational re-structure and significant integration of four cultures the Trust sits in the top 20% of performance in 31 of the 38 key factors, being in the highest or above average category.
- **Sickness Absence** - sickness absence was reduced by 0.26% releasing £325,000
- **Labour Turnover** – this also fell from 9.64% to 8.12% releasing approx £1m
- **HMPA Award** - In 2011 the Trust won a Health-care People Management Association (HPMA) award

for 'Staff engagement and leadership through challenging times'. This was done by demonstrating how, with a small amount of resource, a lot of enthusiasm, creativity and involvement with staff at all levels, a culture of engagement in challenging times can be begin. Since winning the award the Trust has continued to refine and strengthen its signature approach, which has helped sustain engagement achievements and to support organisational integration and major re-structure.





GOOD PRACTICE CASE STUDY

- **Finalists in HSJ Awards** - Bolton NHS FT was shortlisted from over 1,770 entries in the 2012 HSJ awards, for the Staff Engagement category sponsored by Unison
- **'Conversation' events** – 43% of staff evaluated such events as excellent and a further 55% rated them as good; with staff showing real enthusiasm to make Bolton NHS FT a great place to work. The "conversation" methodology has now become the Trust's signature approach for communicating key issues and listening and acting upon the views of staff
- **Case Work Projects** – deep engagement case work, conducted within previously disengaged teams, demonstrated that such work led to:
 - Engagement levels, measure in staff temperature checks increased from 2.5 to 4.5 within two months
 - Sickness absence significantly reduced within six weeks
 - Attendance rates improved by 53%
 - Grievances and disciplinarys reduced, with a withdrawal of two grievances
 - Staff undertook more training and the quality of appraisals increased as did staff involvement in workplace improvements
 - Team work, day-to-day involvement, innovation and problem solving activities increased as did management and leadership skills, due to increased motivation and discretionary effort
 - 30% increase in productivity led to an increased income of £68K and improved involvement and engagement in a nine month period, enabling increased patient and service user satisfaction and the achievement of CQIN targets
 - Staff who were involved in the very first case study presented their Staff Engagement journey. This demonstrated the practical realities of the approach and the impact engagement had on satisfaction and morale.

BACKGROUND

Following the implementation of Transforming Community Services (TCS) and Making it Better (MiB), Bolton NHS Foundation Trust increased its staffing by 2,000 to become an integrated provider of hospital and community healthcare services serving a local health population of around 300,000 and an annual budget of approximately £260 million. With the integration of community services and the development of a regional 'supercentre' for the care of women, children and babies the Trust was renamed and restructured to ensure that the right management structures were in place to deliver the integrated services and to create a new organisational culture for all staff.

The Challenge

In 2007 the Bolton NHS FT's staff survey showed that whilst it had a reputation for being forward-thinking it only achieved average staff survey results which had been stagnant for some time. Recognising the need for a significant shift in the culture in order to achieve its ambitions a review of staff survey data and learning from its "lean" journey revealed that the Trust had a "tell" rather than a "listening" culture. With compelling evidence published in the MacLeod and Boorman reports the Trust decided to develop a unique blueprint to accelerate engagement.

- **Engaging Manager Programme** – This programme achieved excellent evaluations with a total of 214 managers completing it to date and a target for a further 300 managers to attend in 2012/13.

KEY AIMS

- To understand the value of Staff Engagement in healthcare
- To complement the organisational approach towards Lean (Bolton Improving Care System – BICS)
- To develop a signature approach to staff engagement
- To significantly accelerate levels of engagement and other key factors as recorded in the NHS Staff Survey
- To realise the benefits of staff engagement for staff, patients and the organisation





GOOD PRACTICE CASE STUDY

KEY STAGES OF SET-UP

2007 - Research was conducted into staff engagement, and partnership working was established with staff side representatives



2010 - Business case presented to Board of Directors and project plan agreed upon. A series of big conversations then began with staff, which led to seven workstreams being created. Also the 'Engaging Manager' Programme was launched which enabled targeted leadership and management programmes to be developed.



2010-11- The Trust widened its approach to capture 1500 further staff when community services integrated within the Trust. Regular "staff engagement temperature checks" conducted to monitor engagement and work was carried out at deeper level amongst disengaged teams



Mar 2012 - present - Trust core values were identified, launched and used in appraisal to help facilitate honest conversations around attitude and performance of staff and managers. These values were integrated into recruitment processes and a range of organisational policies and procedures.

HOW IT WORKS

Governance

Bolton NHS FT's approach to staff engagement, was initially supported by a detailed project plan, is sponsored by the Director of Workforce and Organisational Development and led by the Associate Director for Organisational Effectiveness and Staff Engagement. Progress is monitored by the Board of Directors and the Best Employer Group.

Staff Engagement Team

A team of 3 staff who are also part of the Trust's Organisational Development (OD) team lead on designing, implementing and sustaining the engagement approach. In addition the Trust has an engagement champions group who meet monthly to support implementation of engagement activity and continuously feedback on engagement matters within their division, departments and specialities.

Research/Partnership Working

The Trust's journey really began in 2007 when it laid the foundations for productive partnership working with staff side representatives, and conducted a considerable amount of research into staff engagement. This comprised a comprehensive review of the literature which enabled Bolton NHS FT to identify what the potential barriers might be. By 2009 the Trust had begun to develop a greater understanding of what staff engagement could achieve and began visiting best practice sites in healthcare and non-healthcare settings. This research helped project leads understand that there was no single blueprint to follow.



Business Case

In 2009 a compelling business case was presented to the Board of Directors, who approved a project plan to implement a signature approach to staff engagement in order to:-

- Reduce the costs of sickness absence, which at the time cost an average of £7m per year. It was predicted that a 1% reduction in sickness absence would yield an estimated cost saving of £1.25 million.
- Reduce the costs of labour turnover, which at the time was in the region of £6.5m by reducing turnover from 9.27% to 7.41% This was predicted to save approximately £1,304,208.
- Achieve a 10% release of discretionary effort, measured by increased productivity estimated to be worth £5.25m (as measured by local and national Staff Engagement scores with increases in productivity evidence through casework)



GOOD PRACTICE CASE STUDY

Staff Conversations

Initially a series of Big Conversation events were held with over 700 staff, to discover what mattered to staff at work. Conversation events involve the CEO and the Director of Workforce and Organisational development and utilise appreciative inquiry to maximise the opportunity for staff to openly voice their opinions and ideas. From these events seven major work streams for action emerged.

Work Streams

Each work stream was made up of staff who volunteered to be involved in making improvements around the topic areas and each had a sponsor to help lead and /or support the group.

1. Values and behaviours
2. Effective leadership and management
3. Effective team working
4. Simplification and improvements in the quality of Appraisal
5. Improvements in Communications
6. Recognition and wellbeing
7. Review of staffing levels

The workstreams were led by senior managers as sponsors and led to the following actions:

- Identification and launch of a set of organisational values, which have been integrated into the appraisal and recruitment processes
- A comprehensive review of management and leadership training, with the introduction of the Engaging Manager programme and medical leadership programmes
- An increase in the use of coaching and the use of psychometric assessment capability in order to support team and individual effectiveness and recruitment
- Introduction of eRostering and ongoing review of staffing levels
- Ongoing delivery of staff recognition awards to include recognition of "values" living individuals

At the point of integration another series of conversation events were held with community staff in order to understand and allay staff concerns. The conversation events have now become a part of Bolton's signature approach in communicating and listening to staff concerns and ideas. Most recently events were run to support the current financial challenges facing the Trust and highly valued by the staff.

Staff Temperature Check

In 2011 the Trust designed and implemented a very simple way of tracking staff engagement in all wards and departments using a "Staff Temperature Check". This measures sickness absence rates, employee relations cases, staff turnover and productivity in order to produce a staff engagement score which can be reported on to the Trust Board on a quarterly basis. These temperature checks identified engagement as being low throughout 2011, indicating that further work was required. (see Appendix 2 for the template used)

Engagement Case Work

Our deeper understanding of engagement developed from working with a number of teams who were identified as having lower levels of engagement impacting upon staff morale and productivity. This work enabled us to develop a diagnostic matrix. The casework helped to determine the likely causes of disengagement and priority actions required to raise and sustain engagement. This case work was undertaken in clinical and non-clinical areas such as A&E, Telephone Access Centre, Laboratory Medicine, and involved creating qualitative case studies based on employee responses.

Using engagement methodology, and in partnership with staff side, the Trust was then able to measure outcomes against previous engagement indicators and improve engagement levels. This deeper level of work showed a direct correlation between staff engagement, management and leadership style and performance, which has helped managers to really understand the value and impact of staff

engagement. Case work has also embedded a standard way of assessing and monitoring the impact of staff engagement on the bottom-line

Engagement Mapping

The Trust's Workforce Directorate is now able to map key workforce related indicators across every ward and Department, which allows it to monitor team engagement. This will enable the Trust to map staff engagement directly against patient outcomes in future, to develop knowledge of its impact on quality and service.

'Engaging Manager' Programme

A locally designed and delivered half day Engaging Manager Programme, which includes a 180 degree questionnaire, was rolled out to 240 managers and leaders across the Trust, with very positive results. This is now mandatory for all band 7 grades and above. The engagement team's experience of delivering this programme has enabled it to scope and theme challenges that managers face and in order to provide a range of targeted support, such as coaching, additional leadership and management programmes and master classes. In addition a range of local and accredited programmes are available to managers, with specific need being identified through appraisal or in order to support emerging team or organisational challenges.

The Trust OD and Learning department provide a comprehensive range of leadership and management programmes, team development and one- to-one support to help managers achieve motivational and inspirational competence – a key factor of engagement. The OD team also utilise a range of psychometric tools to improve individual and team performance and also provide leadership development for medical staff.



GOOD PRACTICE CASE STUDY

Trust Values

The establishment of Trust values means that managers' performance can be measured against these values at appraisal. This enables honest yet challenging conversations to take place, framed around the values. Early indicators have shown that managers find this helpful and see feedback as constructive. The Trust has also begun to utilise the values in its recruitment process and has a timeframe for aligning the values into other aspects of organisational life such as HR policies

HR/OD Restructure

The Director of Workforce and Organisational Development has been instrumental in challenging the traditional HR/OD ways of working to develop a more integrated approach towards supporting the organisation. The approach has involved redesigning and establishing a number of essential cornerstones for engagement such as partnership working, modernising strategic and operational HR, organisational development (OD) and involvement in improvement activity. HR and improvement team colleagues have also received training in engagement methodologies to widen use of the approach.

At service level the newly appointed senior managers, including Medical leaders are actively embracing and supporting the approach in order to accelerate performance. At a team level, in conjunction with the Engaging manager programme and the Lean Transformation team, case work is continuing to give line managers real time experience in developing engagement behaviours that produce improvements in patient and service outcomes.

Bolton Improving Care System (BICS)

Bolton NHS Foundation Trust is a leader in the application of lean principles in healthcare, through the development of an in-house system coined 'Bolton Improving Care System' (BICS). This is a way of reducing wasteful processes such as duplication, errors and poor organisation, to ensure provide safe and high quality services that

patients value, whilst reducing frustrations and enhancing job satisfaction for staff.

Increased staff engagement and involvement in undertaking improvement work has empowered staff to deliver improvement for themselves. All staff groups at every level have been involved in developing BICS, and are encouraged to influence and contribute to the quality improvement plan and suggest ideas for improvement.

Sharing of Best Practice

The Trust has recognised the need to share learning externally as well as internally. Thus it regularly shares progress through reports, newsletters, webinars and forums and has presented at regional and national levels - with visitors from as far as New Zealand and Australia.

RESOURCES

Funding for the approach was supported by a successful bid to the Social Partnership Forum for £40K, which was spent over a two year period to support ongoing implementation. The approach is led by the Head of Organisational Effectiveness and Staff Engagement, alongside a part-time Staff Engagement Advisor and Administration support.

KEY CHALLENGES

- The greatest challenge was convincing leaders and managers that this approach was beneficial. This was achieved by providing the very real evidence of the impact of engagement carried out within the casework, demonstrating that better engagement led to improved workforce and productivity metrics. This persuaded managers to adopt this approach themselves. Engagement is now attractive to staff and managers alike as it provides very simple, yet powerful approaches towards improving collective teamwork and the management of desired behaviours and attitudes.

- Major NHS reforms have created new economic environments, workforce and service uncertainties, which have potentially made it difficult to sustain staff engagement. However by remaining flexible the Trust has been able to adapt its approach to meet all kinds of organisational challenges, be they at an organisational, speciality or team level. It has achieved this by designing, delivering and establishing simple methods of training managers and leaders, regularly monitoring engagement levels and tackling behaviours and attitudes. New ways of defining HR/OD interventions have also been discovered which raised the bar of HR/OD effectiveness and value across the organisation.

KEY LEARNING

- The Literature around staff engagement suggests that there is no single blueprint that can be followed. The Trust has discovered this to be true, and whilst it has learnt from various pioneers it has developed its own signature approach, which is now being shared widely, both internally and externally, as knowledge and experience about deepening engagement grows.
- It is **possible** to create a **habit** for engagement by taking the concept beyond the staff survey level and by being able to demonstrate, through deep engagement activity, the benefits that this approach can bring.
- By putting staff at the heart of what a Trust does, and capturing this in its core values, patients have a better experience and the organisation becomes more productive.
- Bolton NHS FT has discovered that its approach is highly transferrable to other organisations, particularly in terms of cost effective implementation. Therefore it has been sharing experiences on a number of levels from a lean (BICS) perspective, locally, nationally and internationally through links with visitors to the Trust.



GOOD PRACTICE CASE STUDY

SUSTAINABILITY

Due to the successes achieved, on-going development of an engagement culture remains a priority for the Trust. The adopted approach has become one that is now actively sought by managers as a practical process for helping to bring about desired behavioural and attitudinal change and subsequent performance results for even the most challenging situations.

- **Engaging Manager Programme** – a target has been set for a further 300 managers at Band 7 and above to take part in this programme during 2012/13. This will allow correlations to be drawn between managers' 180 degree feedback questionnaires and their teams' reported levels of engagement, which will allow targeted support to be offered to managers and HR/OD interventions where necessary, and will improve managerial responsibility and accountability.

CONTACT FOR FURTHER INFORMATION

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NEXT STEPS

- **Trust Values** - the Trust's core values were officially launched on the 28th March 2012. There is a planned programme for embedding these values using a campaign approach through 2012/13 to implement and monitor impact.
- **Realign Workforce Directorate** - by using engagement methodology the Trust is about to realign the focus of the Workforce Directorate into a more effective integrated service, enabling HR/OD interventions to be more closely aligned and responsive to business needs, totally re-thinking the traditional approaches towards improving employee-relation challenges.

SUPPORTING MATERIAL

- **Appendix 1** – Project Plan
- **Appendix 2** – Staff Temperature Check
- **Appendix 3** – Leadership & Management Style Questionnaire (LMSQ)

