



**Mid and South Essex NHS  
Foundation Trust powers  
their decision-making with  
triangulated workforce data**





**As one of the biggest NHS Trusts in the UK, Mid and South Essex NHS Foundation Trust serves over 1.2 million people every year. The combined organisation provides acute and some community services across three main hospitals.**

### **MANUAL AND TIME-CONSUMING REPORTING**

Dean Russell, Head of Temporary Staffing at the Trust, had previously been using raw data from the Allocate Optima rostering system for reporting and analysis, which was challenging due to the sheer amount of data he was dealing with and the time it took to download, export and then upload into their BI tool.

For Dean, who regularly needed a clear view of bank and agency data, viewing and analysing week-on-week workforce data was a simple task within Allocate Optima, but long-term trend analysis over two years or more, was much more time-consuming. **The team would need to download 104 separate reports, wait 6 hours each time whilst they downloaded** and then manually run queries on them.

The Trust wanted to **move away from operating according to the ‘feel of things’ and employ a more evidence-based way of working, putting data at the forefront of their decision-making.**



## POWERING THEIR BI WITH ALLOCATE DATAHUB

With a data first mindset, the Trust decided to start using Allocate DataHub to feed their workforce data into their business intelligence tool. Which immediately empowered them with insights they'd never had access to before.

The Trust is looking at improving planning and oversight within the organisation and one such measure is looking at the distribution of leave across the financial year, but with over 900 cost centres across the Trust and the sheer amount of data, it was something they had never been able to produce before.



The access to up-to-date workforce information via their BI tool has been transformative for Dean and his team. FOI requests are a regular request and the team would spend weeks collating all the information manually, they are now automatically feeding this data directly into a dashboard in their BI tool, allowing them to respond quickly.

Dean has built a dashboard encompassing all regular requests the team receives, so if someone asks him how many off-framework bookings they had last month, he can just click a button and share.

Visibility of this information at a local level only meant no one had complete oversight for the entire Trust, which often led to staff building up leave and requesting time off at the same time, resulting in lots of leave carryover and requirements to fill the shortages with bank or agency staff. This information will be automatically fed into the Trusts BI tool via Allocate DataHub, making it available at the touch of a button, which will be a game changer, according to Dean.

“One of the most powerful things has been the easy access to up-to-date data. The ability to pull out what you need really quickly is helping us to make informed decisions and dispel myths” commented Dean.

**Feeding workforce data into their BI tool has transformed the Trust's standard reporting capabilities:**

<b>Report</b>	<b>Previous run time</b>	<b>Run time in BI tool</b>	<b>Time saved</b>
Bank & agency forecast Two weeks ahead	20-30 minutes	0.1ms	10 hours a month
Bank & agency accruals For financial year	4-8 hours	500ms	Up to 16 hours monthly
Annual leave balance For the entire Trust	Unable to previously report on at scale	1 minute	-
Demand template information	Two weeks	12 seconds	Up to 75 hours



## SUPPORTING AGENCY REDUCTION

As part of a wider Trust initiative to reduce agency spend, Dean and his team have set up a dedicated dashboard for clear visibility of when rosters are being sent out, when shifts are being sent to bank and the average time to fill, helping to identify trends in booking behaviours. By feeding this data into their BI tool, they have been able to triangulate with the demographical data from their ESR. The team can now see who is picking up shifts and why, helping to understand what motivates people and supporting them to fill shifts before going to agency.

**“It’s not useful to simply see agency use going up and down. What is really useful is having visibility of behavioural analysis and trends on things that might impact agency usage. This is helping us to understand why it’s going up and down. It’s providing us a layer of transparency we didn’t have before”,** said Dean.

The transparency of data gives the Trust confidence in the decisions they are making. The triangulated data means they can easily see and evidence the positive impact their decisions are having on agency spend.





## GETTING BACK TO BASICS

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**Publishing rosters six weeks in advance and sending them to bank sooner, helps to increase fill rates. This is best practice that all healthcare organisations know. We now have the evidence to back this up and demonstrate it, which has made it so much easier to convince the Trust that priorities need to change and it needs to be about planning ahead. The transparent data is having a big impact, it's empowering people to change mindsets and behaviours.”** said Dean.



## TRIANGULATING DATA

The big benefit for Mid and South Essex has been the triangulation of data. They have started triangulating their workforce data with multiple other sources, such as ESR, vacancy, budget establishment and spend data.

**The team now have a connected view of workforce data and vacancies from each cost centre, making it simple to pinpoint areas that are operating outside the vacancy numbers they are established for.**

With workforce data automatically available in their BI tool, the Trust can now easily reconcile their demand templates and Finance Standard Rosters (FSRs), showcasing the monthly ESR budget and vacant duties, highlighting any disparities between demand and capacity.

## LOOKING TO THE FUTURE

In the long term, Dean wants to triangulate workforce and patient activity data, so the Trust can spot trends such as the types of patients coming in and when and how that impacts sickness, fill rates, bank and agency usage.

From this, they will get a true idea of the driving force behind bank and agency usage allowing for better planning of the workforce.

Dean would also like to incorporate machine learning and generative AI reports, helping them to identify things they can't see from a surface level analysis. From there, the Trust can build an interventional framework to mitigate risk and introduce positive change.







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