

## PWYLLGOR CYLLID / FINANCE COMMITTEE

<b>DYDDIAD Y CYFARFOD:</b> <b>DATE OF MEETING:</b>	29 September 2020
<b>TEITL YR ADRODDIAD:</b> <b>TITLE OF REPORT:</b>	Consultant & SAS Doctor Job Planning
<b>CYFARWYDDWR ARWEINIOL:</b> <b>LEAD DIRECTOR:</b>	Dr Philip Kloer, Medical Director/Deputy Chief Executive
<b>SWYDDOG ADRODD:</b> <b>REPORTING OFFICER:</b>	Helen Williams, Medical Directorate Manager

### Pwrpas yr Adroddiad (dewiswch fel yn addas)

#### Purpose of the Report (select as appropriate)

Er Gwybodaeth/For Information

### ADRODDIAD SCAA SBAR REPORT

#### Sefyllfa / Situation

This paper presents an update in relation to the job planning process across Hywel Dda University Health Board (HDdUHB) as requested at the previous Finance Committee meeting. This report is provided for information purposes.

#### Cefndir / Background

Job planning is a mandatory process, which was highlighted as part of the amended Consultant Contract (2003) and, more recently, as part of the Staff and Associate Specialist (SAS) Doctor Charter (2016). Job plans help to ensure that there is a clear consensus between Consultants, SAS Doctors and the Health Board (HB) in regard to the work that is being undertaken, where and when it will be undertaken, the number of hours/ sessions that the individual is required to work, the work that is expected of the individual and the resources required. Effective job planning results in an alignment of an individual's work with departmental and strategic objectives, resulting in a much more cost-effective delivery of healthcare.

Reviews undertaken by the Auditor General for Wales of the job planning process across HDdUHB identified a number of areas for improvement. This resulted in the HB creating action plans to increase the effectiveness and efficiency of the process, to ensure that the desired results can be achieved. The HB's priorities included:

- Increasing the number of Doctors working to up-to-date job plans;
- Increasing the quality, consistency and transparency of job plans;
- Introducing and implementing local job planning guidance in the form of Consultant and SAS Doctor Job Planning Toolkits;
- Introducing and utilising the 'Allocate' online electronic job planning software system.

#### Asesiad / Assessment

The job planning process across HDdUHB has improved significantly since the last Auditor General for Wales review in 2016. A total of 24 recommendations for process improvement were highlighted by the review, and a HB action plan was monitored regularly by the Health Board's

Audit and Risk Assurance Committee (ARAC). The final review recommendations were confirmed as complete by the Committee in March 2020.

As part of the improvements made to the job planning process, the Allocate e-job planning system was procured in February 2018, following a successful Welsh Government 'invest to save' bid. The system has been built in accordance with national requirements and incorporates local standards and tariffs, as detailed in the HDdUHB Consultant and SAS Doctor Job Planning Toolkits. Allocate was confirmed as the only acceptable format for job planning across the HB at the beginning of January 2020, and it is anticipated that by the end of March 2021 every Consultant and SAS Doctor will have a job plan on the system.

Currently, 90% of Consultants and SAS Doctors have a job plan. Of the job plans in place, 40% are current (i.e. reviewed within the last 15 months) and have been fully signed off. A further 40% of job plan reviews are in draft form or are awaiting sign-off, bringing the total number of job plans in the current review stage to 80%. Of those job plans in the current review stage, 74% are on Allocate. It should be noted that the job planning process was suspended for a number of months in response to the COVID-19 pandemic, yet the figures above demonstrate the continued progress made and the collaborative efforts of the Directorates involved.

During the initial stage of e-job planning discussions, the Allocate software company submitted a business case which set out potential efficiencies and monetary savings which could be realised through the successful introduction and implementation of the online e-job planning solution. A key benefit associated with the Allocate system relates to the reporting function, and the system enables an informative job plan activity report for all the Consultants and SAS Doctors at HB sites to be provided to the Finance Team. Reporting includes the numbers of sessions allocated to an individual clinician, the Direct Clinical Care (DCC) and Supporting Professional Activities (SPA) split, in addition to more detailed information such as outpatient activity, theatre activity, patient administration, etc. This information will prove invaluable in helping to ensure that future activity can be monitored and planned to more accurately meet the needs of the service and to track funding to various areas and departments.

**Argymhelliad / Recommendation**

The Finance Committee is asked to note the progress made in the job planning process, as reported through ARAC.

<b>Amcanion: (rhaid cwblhau)</b>	
<b>Objectives: (must be completed)</b>	
Committee ToR Reference Cyfeirnod Cylch Gorchwyl y Pwyllgor	Not Applicable – report provided for information only
Cyfeirnod Cofrestr Risg Datix a Sgôr Cyfredol: Datix Risk Register Reference and Score:	Not Applicable
Safon(au) Gofal ac Iechyd: Health and Care Standard(s):	2.1 Managing Risk and Promoting Health and Safety 3.1 Safe and Clinically Effective Care

Amcanion Strategol y BIP: UHB Strategic Objectives:	<p>2. Living and working well</p> <p>4. Improve the productivity and quality of our services using the principles of prudent health care and the opportunities to innovate and work with partners.</p> <p>5. Deliver, as a minimum requirement, outcome and delivery framework work targets and specifically eliminate the need for unnecessary travel &amp; waiting times, as well as return the organisation to a sound financial footing over the lifetime of this plan</p>
Amcanion Llesiant BIP: UHB Well-being Objectives: <a href="#">Hyperlink to HDdUHB Well-being Statement</a>	<p>Improve efficiency and quality of services through collaboration with people, communities and partners</p> <p>Develop a sustainable skilled workforce</p>

<b>Gwybodaeth Ychwanegol: Further Information:</b>	
Ar sail tystiolaeth: Evidence Base:	<ul style="list-style-type: none"> <li>- Pay and Modernisation: <i>NHS Consultant Contract, Hywel Dda Health Board</i> Welsh Audit Office: 2011</li> <li>- <i>Consultant Contract in Wales: Progress with Securing Benefits</i> Welsh Audit Office: 2013</li> <li>- <i>NHS Consultant Contract: Follow-up of Previous Audit Recommendations Hywel Dda University Health Board</i> Welsh Audit Office: 2016</li> <li>- <i>UHB Management Response to the WAO Consultant Contract follow-up review (2015)</i></li> </ul>
Rhestr Termau: Glossary of Terms:	Explanation of terms included within the report.
Partion / Pwyllgorau â ymgynhorwyd ymlaen llaw y Pwyllgor Archwilio a Sicrwydd Risg: Parties / Committees consulted prior to Audit and Risk Assurance Committee:	<p>Local Negotiating Committee (LNC)</p> <p>E-Job Planning Implementation Group</p> <p>Senior Clinical Leads</p> <p>Executive Directors</p>

<b>Effaith: (rhaid cwblhau) Impact: (must be completed)</b>	
<b>Ariannol / Gwerth am Arian: Financial / Service:</b>	The Invest to Save proposal was approved by Executive Team in August 2017 and implementation of the e-job planning system is expected to deliver savings as described in the original submission.
<b>Ansawdd / Gofal Claf: Quality / Patient Care:</b>	Good job plans are expected to deliver improvements in quality and patient care.
<b>Gweithlu: Workforce:</b>	As the Toolkit has been discussed extensively with the LNC it is not expected that the consultant workforce will be impacted adversely although individual consultants may raise issues at their job plan meetings.

<b>Risg: Risk:</b>	A risk register will be compiled as part of the project management of the implementation of the project.
<b>Cyfreithiol: Legal:</b>	Legal challenges are not anticipated.
<b>Enw Da: Reputational:</b>	Not expected.
<b>Gyfrinachedd: Privacy:</b>	Information governance protocols will be adhered to and the software complies with all relevant protocols.
<b>Cydraddoldeb: Equality:</b>	Undertaking job planning utilising the guidelines and an electronic system will ensure a greater degree of consistency.