

## Case Study

### *Implementing e-KSF in an NHS Ambulance Trust*

<b>Name of Organisation</b>	Welsh Ambulance Service NHS Trust
<b>Number of employees</b>	Approximately 3,000 staff
<b>Organisational Sites, Services and geography.</b>	<p>Spread over an area of 20,640 kilometres and serving a population of 2.9 million, this diverse area encompasses tranquil rural retreats, busy seaside resorts and large urban conurbations.</p> <p>The Welsh Ambulance Service uses varied and modern services that are tailor-made for each community's differing environmental and medical needs, from cycles to fast response cars, frontline ambulances, helicopters and nurses in our control centres. A key component of the Trust is NHS Direct Wales with its 24 hour health advice and information service, signposting the people of Wales to the most appropriate level of healthcare for their needs.</p> <p>The service attends more than 250,000 emergency calls a year, over 50,000 urgent calls and transports over 1.3 million non-emergency patients to over 200 treatment centres throughout England &amp; Wales.</p> <p>The Trust operates from 90 ambulance stations, five call centres, three regional offices and five vehicle workshops.</p>
<b>Healthcare Business</b>	Ambulance Service & NHS Direct Services

### The Project Team

The Project Management Team involved in the implementation of the e-KSF includes e-KSF Champions, nominated across the organisation and is led by James Moore & Menna Evans.

Position	Quote
James Moore Head of Workforce Modernisation & OD	"Implementing a personal review system in an organisation effectively from scratch is a long project which requires a high degree of realism. It also requires using every tool at your disposal to assist the process, the reviews and the monitoring. The e-KSF is increasingly become an invaluable tool and as in integral part of our strategy."
Menna Evans Learning & Development Administrator	Since implementing e-KSF within the Trust we have delivered a lot of training to Managers to support this process which have been received and use of the system has improved. This is now becoming a valuable tool by ways of recording PDR's etc and reporting system.

## KSF Implementation Method

The Trust's initial approach to implementing the KSF was to train as many staff and champions as possible and continually push for PDRs to be undertaken using KSF outlines.

By 2008, it was recognised that this had had limited success with less than 20% of staff having participated in a PDR and those that had were used to the PDR cycle. The Trust then decided to focus on ensuring that as many staff as possible participated in PDRs and this was performance managed through the Executive Team.

This was supported by extensive PDR training being provided to managers as well as a range of materials containing helpful tools and techniques. By mid 2010, approximately 65% of staff had participated in a PDR *with the Trust accepting that the quality of the PDR would not have been perfect in every occasion*. Additionally, it was accepted that whilst the ideal was that the KSF outline was used as a method of assessing competence and identifying areas for development, this might not necessarily happen in every occasion.

A Trust strategy for reinforcing the KSF, and introducing the e-KSF as the preferred method of recording the PDR, was to ensure that:

- In year 1, every member of staff has a KSF outline assigned to them;
  - In years 2-4, every outline is reviewed through a central "reminder" process
  - in 1-3 years every member of staff has a PDR with their managers;
  - in years 2-4, the quality of the conversation improves;
  - in years 2-5, all PDRs are conducted using the KSF outline;
  - in years 1-2, the e-KSF is used to record the basic elements of the PDR process
  - In years 2-5, the e-KSF is used to record all elements of the PDR process
- NB – year 1 is considered as 2008-end of 2009/early 2010*

At the end of August 2010 eKSF reports were able to demonstrate;

%age Staff with PO	%age Staff with PDR	%age Staff with Objectives	%age Staff with PDP
100.0%	34.5%	36.6%	41.6%

*28<sup>th</sup> August 2010*

NB – the Trust's paper based reporting identified that over 65% of staff had had a PDR by May 2010.

## Constraints

The Trust had a very limited culture of learning and personal development. Most learning was organisationally driven with very little personal ownership of learning. However, the Trust has managed to get a majority of staff and managers to understand the importance of PDRs in relation to this and to actually undertake them.

The challenges now are around ensuring that managers and staff continue with the momentum to continue to ensure PDRs occur and improve their quality as well as ensuring that where PDRs have not been undertaken, this happens. This will mean a battle against

competing time pressures especially where time-release for staff equates to increased costs to the organisation.

In terms of ensuring that staff and managers actually use the KSF & e-KSF as a useful tool to identify capabilities and help develop staff appropriately, there is still some distance to go and the work is ongoing. Part of this is that the KSF is seen as a relatively complex & sophisticated tool, and for staff and managers who do not have a developed learning culture, this will continue to be a challenge. It is hoped that this will improve with the continued level of training and support being provided by the central team to managers & staff across the organisation.

### **Use of the e-KSF**

Up until now, the e-KSF has been used to create and assign Post Outlines to staff, and in a limited capacity for managers & staff to record PDR's, objectives and PDP's. With self service access becoming more wide spread following a Trust wide training process, the use of reports in the e-KSF system, and the link between e-KSF and the NHS ESR system ,means that there is little duplication is work to maintain the system, that the majority of PDRs are being recorded, and more importantly reported, from a single system.

Access to the e-KSF takes place each day in the centralised department, and on a semi-regular basis for managers and staff – staff feedback to date suggests that they find it very easy to use for the main sections for PDR, objectives and PDP. During the rollout of the e-KSF system the Trust is also centrally recording PDR activity, in e-KSF, using a variety of tools available within the e-KSF to support centralised input during wider deployment.

### **Benefits for individuals and managers:**

In general, staff are taking responsibility for their own learning needs within the Trust. This has been linked to all applicants needing to submit their PDP as part of the recruitment process, especially for staff in post who are on the process of applying for more “senior” roles.

The KSF as a tool is seen as very useful, although it can initially be assessed as over-complicated for staff who are not used to a PDR process –once managers & staff have been trained and begin to use the e-KSF they do start to see how simple it can be for them to record PDR, objective and PDP data.

The e-KSF is an excellent way of projecting the KSF framework and associated processes to staff and managers, but it does rely on a level of IT competence, a small amount of training, and confidence as well as having the infrastructure in place to use it.

## Benefits for the organisation:

The Trust is at the embryonic stages of properly using the KSF, although it is certainly bringing benefits to some key project work concerning the development of new roles.

- Having a standard tool is very helpful way of ensuring an element of consistency and quality in the PDR process. However, it mainly relies on staff preparing themselves in advance and managers being aware and competent in its use.
- Improved use of the KSF as part of the PDR process.
- Greatly improved reporting & performance management processes including ensuring that the application of gateways is fairly and consistently applied.
- The e-KSF provides a user-friendly way of ensuring that managers and staff can report their PDR activity. It also encourages staff/managers to actually access and review the KSF outlines.
- From an organisational point of view, the reporting from the e-KSF is becoming increasingly invaluable.
- E-KSF is now being used as a tool to support the KSF and is being recognised as a key tool to support the PDR process and there is an increasing critical mass of staff who have participated in a PDR using the e-KSF.

## Next Steps

The Trust is now at the key stage where it aims to ensure that all staff know how to access the e-KSF online tool for recording their own PDR, objective and PDP data, and a commitment to a series of regular training workshops that staff can attend to gain this knowledge.