



Case Study: Implementation of the e-KSF & AT-Learning

Solihull Care Trust uses the e-KSF and AT-Learning to deliver high quality, integrated appraisal and development

Organisational Details

Name of Organisation:	Solihull Care Trust
Number of Employees:	1,800 staff
Number of Organisational sites:	1 HQ premises, 1 Training & Development Centre, various health and social care premises across the Care Trust locality
Healthcare Business:	Primary Health & Social Care

KSF Implementation

The KSF was initially implemented using a paper process across Solihull Primary Care Trust. The paper appraisal records were sent to HR for inputting centrally onto a system procured from RTIX. In 2008 the Primary Care Trust integrated with the Social Care Services. This raised the challenge of integrating two established & separate appraisal systems. Following a review of both the KSF Development Review and the Social Care appraisal processes a decision was taken to incorporate the best elements from both systems.

At this stage the use of the e-KSF was considered by the organisation because the tool is able to deliver both the KSF, a mandatory requirement for all health staff, and the ability to create objectives that is core to social care staff appraisal.

The drivers to implement the e-KSF were:

- To support the implementation of the integrated appraisal system across two care partners using one system.
- To monitor and manage appraisal activity.
- To streamline the appraisal process.
- To improve on the reporting of appraisal activity in one single system.
- To assist with more effective planning of training using the e-KSF standard TNA and Workforce Planning tools.

During this phase the organisation was also reviewing the use of the ESR OLM, their current Learning Management System. Following a demonstration of AT-Learning, the only Learning Management System that is fully integrated with the e-KSF, the organisation completed a detailed options appraisal and made the decision to implement AT-Learning based on the following rationale:



- 1) Excellent & proven reporting functionality.
- 2) Fully integrated with the e-KSF for the management of staff data records.
- 3) Speed of the system and immediate delivery of requests from within the system.
- 4) Reduced number of clicks to generate bookings, signing in sheets and reports.
- 5) Simplicity of system to manage core NHS processes related to learning and development.
- 6) User friendly screens.
- 7) Online support via email, chat and telephone support during normal office hours.
- 8) Management of external users is simple and easy to use, including links to other NHS organisations e-KSF accounts for hub & spoke delivery models.
- 9) Scope for development of system via the AT-Learning User groups and community based forums making it easier to have input to simple changes to the system, without large user group sign off.
- 10) Self serve links in with the e-KSF which a large number of staff are already trained to use, and also easier to roll out on a self-serve basis in the future with a variety of self-service models.
- 11) Ability to easily maintain and publish the course catalogue via AT-Learning, for self-service with the e-KSF and as a PDF download for areas with poor access to IT.
- 12) Reduction in amount of administration tasks required outside of the system as managed so easily in AT-Learning.

Implementation:

Project Team:

The project team consisted of:

- Director of HR, Head of Workforce Development, Performance & Information Manager, KSF Lead.

Method

The first stage of the implementing the e-KSF focussed on ensuring that all current post outlines for the health care roles were added to the e-KSF and that all social care roles had post outlines developed and added to the e-KSF. The organisation then identified the number of managers and reviewers that required training on the e-KSF. The organisation procured 10 days training from Think Associates to train the initial groups of managers. The training was supported by the KSF lead, who set up, arranged and co-facilitated the sessions. This ensured that any questions relating to the organisational implementation of the e-KSF could be answered by the organisational representative and also supported the KSF lead in gaining a full knowledge of the e-KSF system. The initial training programme was designed by the KSF Lead in conjunction with their Think Associates Account Manager. Following the initial rollout, the KSF lead continued to deliver a programme of training independently and also arranged follow up sessions with managers on a one to one basis to embed the learning and support the use of the e-KSF in the workplace.

The initial project plan aimed to implement the integrated appraisal system and the e-KSF within 12 months to meet the organisational requirements of reporting on appraisal activity.



The implementation of AT-Learning began 6 months later, following a full data upload of all learning activities from the existing learning management system by the Support Team and two days intense system training. On day two of the training the Trust had access to core mandatory training reports that they had been unable to deliver using their previous LMS.

Identified Success Factors

The organisation have since identified the following indicators as key success factors for e-KSF:

- 200 managers have been trained in the last year.
- 85% of staff have a post outline assigned.
- A significant number of staff have a completed PDR recorded on the e-KSF.
- KSF and appraisal activity remains an organisational priority recognised at Board level.

The organisation identified the following indicators as key success indicators for AT-Learning:

- Fully set up learning management system upon initial training to enable a seamless go-live.
- Full use of the system by the central Learning & Development Administration team.
- All training activities, bookings and amendments to these made only using AT-Learning.
- All course confirmations, DNA & cancellation notifications are sent out through AT-Learning using AT-Learning's email correspondence module.
- The support package procured from Think Associates to implement the systems.
- All e-learning can now be accessed via the e-KSF into ATL instead of a number of different external sources.
- Staff learning history updating directly into the e-KSF, therefore reducing the amount of input staff are required to do for their review.

Barriers to implementing e-KSF & AT-Learning

The barriers the organisation experienced during the implementation of the e-KSF were:

- The time it took to train the managers and then embed their use of the e-KSF.
- Access to PC's especially in the residential care homes.
- The level of IT skills across the organisation.
- The social care managers understanding of the NHS KSF .

The barriers to implementing AT-Learning that the organisation identified were:

- The time constraints in cleansing data to ensure that AT-Learning was set up properly before go-live.
- The limited internal resources to support the implementation.



Current Situation

The organisation is now nearing the end of the first year of the e-KSF implementation project and reports that their current position has resulted in the following:

- There is an established and ongoing programme of training for managers on using the e-KSF.
- There is additional one to one support for managers following the initial training at their request.
- There is an understanding of the need to monitor the data in the e-KSF and maintain it.

The organisation began to implement AT-Learning in September 2009. The current position with regards to progress is as follows:

- AT-Learning is fully implemented in the training department.
- The OLM is no longer used.
- The workforce development department has been restructured to reflect the requirements for seamless management of the three integrated information systems, ESR, e-KSF and AT-Learning.
- Plans are in place to delegate access to trainers and train them how to manage their own course attendance, bookings and customised evaluations.
- Continuing to use the reporting module to meet internal and external requirements.

Benefits Realisation

The current benefits for the organisation of using the e-KSF are:

- More accurate reporting on appraisal activity.
- A reduction in paper records.
- The link between ESR and the e-KSF is working effectively and has reduced the administration time required to maintain the e-KSF.
- One access point for staff and reviewers to record PDRs, objectives and PDPs.
- Record of mandatory training attendance linked from the AT-Learning LMS.

The current benefits to the organisation of using AT-Learning are:

- The integrated use of an LMS linked to the preferred appraisal system.
- More accurate reporting specifically around mandatory & statutory training.
- Significant reduction in administration time in making and changing bookings, setting up courses, generating Attendance / Signing in sheets and marking attendances.
- Reduction in paper when sending course correspondence and increased use of automatic email processes.



- Training records are added to PDPs automatically and the e-KSF PDP allows full self-service management of staff training requests and amendments.
- The ease of use of the system for all users, from Administrators to Staff.

The next steps for the organisation are:

- To improve the maintenance of e-KSF data within the core HR Systems team.
- To reduce the number of manager training sessions.
- To investigate other methods of supporting the embedding of the use of the e-KSF for appraisals.
- To begin to target training to the right staff groups and push mandatory or essential training into the e-KSF PDPs using AT-Learning.
- Delegate full remote management of the IT training activities to the IT training department.
- Consider using the Course Evaluation Questionnaire functionality within AT-Learning.
- Consider using the Competence Based Training module within AT-Learning to perform Kirkpatrick level 3 evaluations of training.
- Offer remote access to other internal trainers, for running reports and marking attendance.

Support

Gaining support from the Senior Managers within the organisation for the implementation of both systems has been important and is monitored regularly to ensure that the systems deliver as expected.

The support that the organisation has received from Think Associates regarding the initial training, which includes telephone and email support with general queries and on-site support that has assisted with the implementation of the e-KSF has been invaluable to the success of the implementation plan. Think Associates were contracted to deliver manager and reviewer training and a structured programme of on site support ensuring the Trust were fully supported during the deployment of both systems. Additional support is given using a combination of phone calls with the Account Manager, and direct to the technical support team using email and live chat, which is used effectively by the admin team.

In addition to general and technical help, the support given by Think Associates has helped the organisation to understand the link between the e-KSF, AT-Learning and ESR and the importance of the links in relation to managing and reporting on workforce data and workforce planning. It has brought the team together across several sites and the benefits are now starting to be being realised.