



Step by Step Guide to Introducing the e-KSF Tool to your NHS Organisation

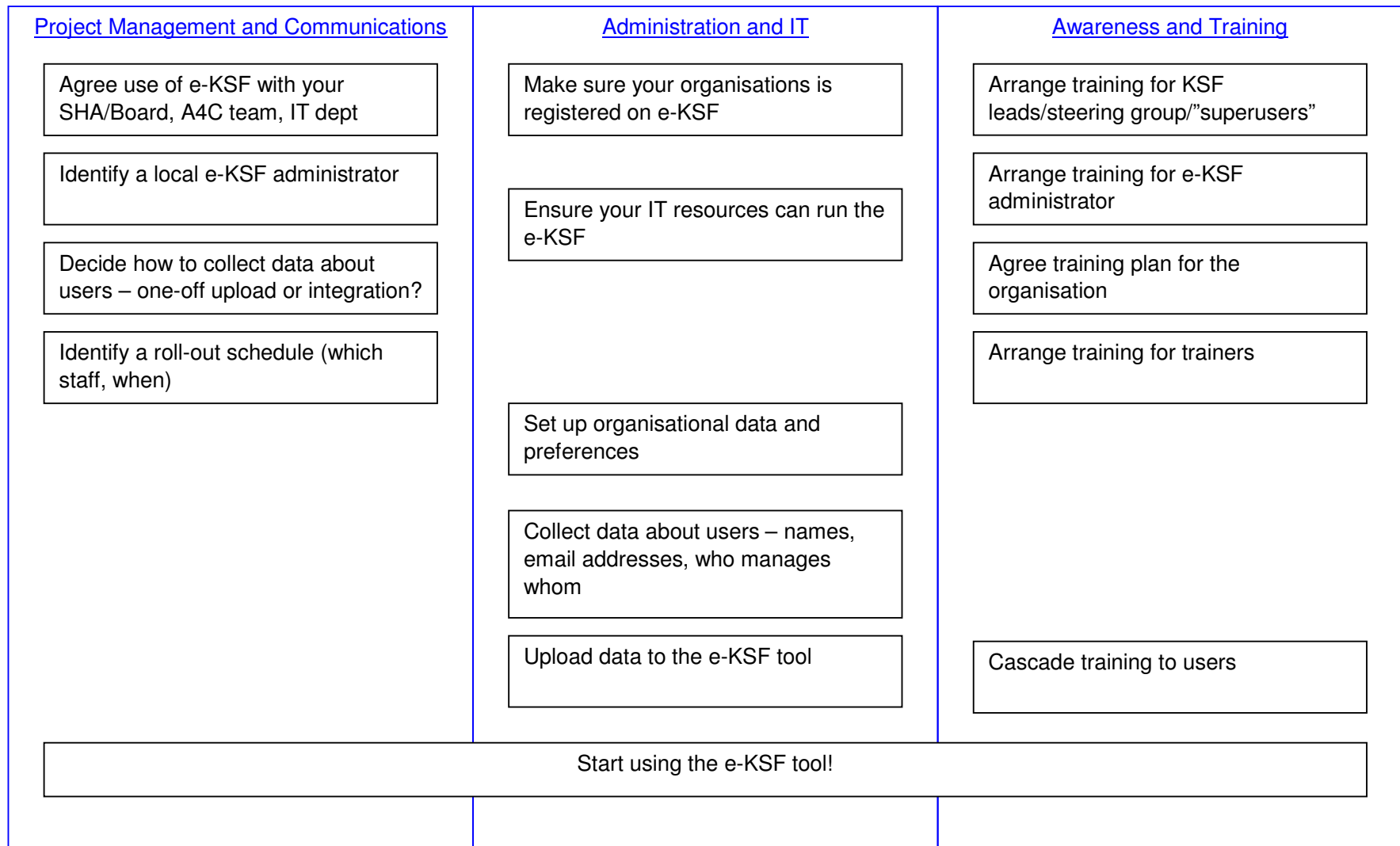
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This short document outlines the main steps you'll need to take when introducing the e-KSF tool to an organisation. It's the best place to start if you have an understanding of the e-KSF, and think you want to use it, but are unsure what to do next. More details about implementation can also be found on the e-KSFNow website (www.e-ksfnow.org) and in the document "e-KSF *Implementation pack*" (which you can access on the e-KSFNow website).

On the next page you'll see a list of ordered activities, split into three streams (Project Management, Administration & IT, and Awareness & Training). On pages 3 – 6 you'll read in a bit more detail about each activity.

If you need more information about the e-KSF roll-out please contact your SHA or Board lead, or the e-KSF support desk.

Step by step to setting up your organisation on the e-KSF tool



Click on a box on this plan to be taken to more details about each activity, or scroll down to browse the document

Activities in More Detail

Agree use of e-KSF with your SHA/Board, A4C team, IT dept

Use of the e-KSF tool will be a major change to the way in which your organisation conducts development reviews (and potentially appraisals). It should therefore be signed-off and supported at the highest-possible level in the organisation. Inform your SHA or Health Board of your decision as well, as they may be able to provide support for training. Your IT department should be consulted, as the e-KSF does require a certain minimum level of IT resources. Unions or staff-side councils should be involved to ensure that they are on-side with the project (the e-KSF stores personal development information about individuals, and staff-side groups may want to be assured that this data is relevant and confidential)

Identify local e-KSF administrator

This person would be responsible for adding and updating user data, co-ordinating the approval of post outlines, and performing other minor functions on the e-KSF tool. The administrator should be comfortable using computers and the internet, and have good attention to detail. They will generally (but not necessarily) be an administrator from the HR or training departments. Time commitments will vary depending on size of organisation – for a large Trust we estimate 1-2 days per week.

Decide how to collect data about users – one-off upload or integration?

The e-KSF tool needs to know who can access what information, and for this we need to upload username, password and access level information. The simplest way to do this is to collect data in a spreadsheet and upload it once to the tool, and then use your e-KSF administrator to update the system with any changes (new starters, leavers etc) – see “collect data” and “upload data” sections of this guide. However this administration load may become quite large in larger organisations, so you may also decide to integrate the e-KSF with your local HR or payroll systems, so that when one system is updated, the others automatically pick up the same data. For more on this contact support@e-ksf.org and/or your Health Informatics Service team.

Identify a roll-out schedule – which staff, when

You need to ensure that all staff have a KSF post outline by October 2005, and that all staff have completed a development review by October 2006. However you don't need to have a “big bang” approach to the e-KSF tool – you may decide to release the tool to staff department-by-department, or site-by-site. It's generally sensible to release the tool from the top of the organisation downwards as well, where possible, so that your senior staff are aware of the approach and support it, and also so that they have participated in agreeing their own KSF post outlines before they discuss their reviewees' post outlines. Also read the “arrange training plan” section of this document.

Make sure your organisation is registered on the e-KSF tool

Each organisation has its own “space” on the e-KSF tool, and administrators and users are registered under individual organisations. Contact your SHA/Board administrator, or support@e-ksf.org, to get your organisation and e-KSF administrator added to the tool. Once added, your e-KSF administrator can then manage all of the data for the organisation.

Ensure your IT resources can run the e-KSF

You should talk to your IT department to ensure that your organisation’s computers are connected to the internet, and have Internet Explorer 6.0 or above installed. You may also need to get the IT department to add www.e-ksf.org to your organisation’s “safe list” of websites so that all staff can access the tool.

Set up organisational data and preferences

The e-KSF tool allows you to set up certain preferences and local customisations for your organisation. Your e-KSF administrator needs to add data to the e-KSF about your departments, your organisational objectives, and funding sources for learning and development. They also need to decide whether you’re going to use the learning activities database, whether your organisation is going to share post outlines with other organisations, and whether to enable “secretary access”. More information about all of these decisions will be available for e-KSF administrators.

Collect data about users

If you decide to integrate the e-KSF with your local system, you don’t need to worry about this step. If you’re uploading data from a spreadsheet, you need to collect together a sheet with, for each user, some basic information including name, email address, manager email, department etc. More information about this is available in the document xxx

Upload data to the e-KSF tool

Once you have a spreadsheet of user data (see above), your e-KSF administrator will be able to add it directly to the e-KSF database using the “bulk upload” module. More information about this is given during administrator training, and also in the document xxx. Once uploaded, usernames and passwords can then be given out during training sessions, and people can start using the system straight after their training.

Arrange training for KSF leads/steering group/”superusers”

It would be useful to introduce the e-KSF tool to the KSF leads and steering group in your organisation first, so that they are aware of the activities and implications. It’s also good to train a few “superusers” in the use of the tool (these may be the same people who run the training) – people who can answer any local questions and champion the approach.

Arrange training for e-KSF administrator

The e-KSF administrator needs to learn how to administer the tool, including adding and editing users, managing post outlines and changing reporting relationships. The basics of this role are explained on the e-KSF Webguide (link in the footer of this document). If the administrator is also intended to be a champion of the tool and someone who can answer questions, run complex reports on the data etc, then face-to-face training is recommended.

Agree training plan for the organisation

Agree how to cascade the e-KSF tool out across the organisations to managers, and then staff. Decide whether you’re going to use the tool for all staff groups from day one, or whether you want to limit use to just those people creating post outlines at first. Do you want to train managers and staff from all departments, or do you want to trial the tool with a smaller number of staff first. If you’re creating a training plan, we recommend you read all of this document, as well as the “day 4” workshop slides which contain additional information.

Arrange training for trainers

Agree how to receive this training – user guides and e-learning support are available free of charge. Each SHA has 6 people who have completed at “train the trainer” course, and these people should be able to help you to roll out the training – contact your SHA/Board lead for more details. Face-to-face training is not provided centrally by the DoH so you can decide the best way to deliver this. The e-KSF project team, or other local training providers and Health Informatics Services, may also be able to provide training (chargeable locally). Discuss this with your SHA/Board lead, HIS, or KSF trainers and best practice facilitators.

Cascade training to users

Training on the e-KSF tool requires an IT training room with computers connected to the internet. A group size of less than 12 is recommended, to maximise quality of learning. Trainees can share computers for the training, if required (2 trainees to 1 computer)

To help you scope the training, the approximate duration of training for each type of user is:

- Administrators – 1 day to learn about specific e-KSF roll-out activities, as well as managing data and approving post outlines
- Trainers – 1 day plus practice time, to learn about how to deliver training and practical sessions to managers and staff
- Manager-level users (reviewers) – 4 hours, typically in two sessions. Session 1 “creating post outlines” and Session 2 “managing the development review”
- Staff-level users (reviewees) – 2 hours, to learn about how the e-KSF will affect their development review and how they can contribute to and benefit from the online process.

Start using the e-KSF tool!

All users of the e-KSF tool will have access to a variety of support mechanisms – log on and click the “support” button from any user homepage to access the support desk and other support materials.