

Case Study

Maidstone and Tunbridge Wells NHS Trust meet their appraisal compliance target in half the time of previous years paper chasing processes with overall compliance at over 85% just 7 months into the first year rollout.



Thanks to Totara Learn and Chambury Learning Solutions, MTW's employee population now have the **Freedom to Learn** and develop equally across the organisation, with streamlined processes to support learning and performance management.

About Maidstone and Tunbridge Wells NHS

Maidstone and Tunbridge Wells NHS Trust [MTW] is a large acute hospital Trust in the south east of England. The Trust was legally established on 14 February 2000 and provides a full range of general hospital services, and some areas of specialist complex care to around 560,000 people living in the south of West Kent and the north of East Sussex.

The Trust employs a team of over 5500 full and part-time staff who work mainly across the two main hospital sites at Maidstone and at Tunbridge Wells. In addition, the Trust provides specialist cancer services to around 1.8 million people across Kent, Hastings and Rother, and also provides outpatient clinics across a wide range of locations in Kent and East Sussex.



The Challenge

The Trust's appraisal system was paper based and every year over 5,500 staff are required to complete their annual appraisal. The paperwork was a word document which was difficult to complete due to formatting, so it was mostly completed by hand and then had to be scanned back to HR. HR would then have to manually log the return in order to provide compliance data with the Learning and

Development team having to manually collate data from the handwritten forms to put into their annual learning needs analysis.

This generally resulted in paperwork going missing, especially where staff moved around the organisation. Sometimes the emails would go astray. Reporting was inaccurate. There was no means to send reminders to managers who had not completed staff appraisals. There were no notifications to the team members themselves.

The whole process was highly intensive for administration. There was no governance. The reporting was patchy at best. It also meant that having an annual appraisal was not carried out equitably across the Trust and staff were missing out on the opportunity to have conversations about their progress and development potential.

The Solution

In 2018 the Trust went out to tender for a new LMS and procured the Totara Learn system from Chambury Learning Solutions. As part of the procurement exercise it was agreed that the proposed solution must include an integrated online appraisal system.

The Trust agreed as an organisation that they would go fully electronic, creating a web-based form that would capture the required data as opposed to enabling staff just to upload a Word document or PDF.



Whilst this would provide some challenges, for example staff in areas where there was limited access to computers, the Trust were able to work around this by using different levels of access along with different forms tailored to the specific area and have everything be available through the Totara based 'MTWLearning' system.

The Results

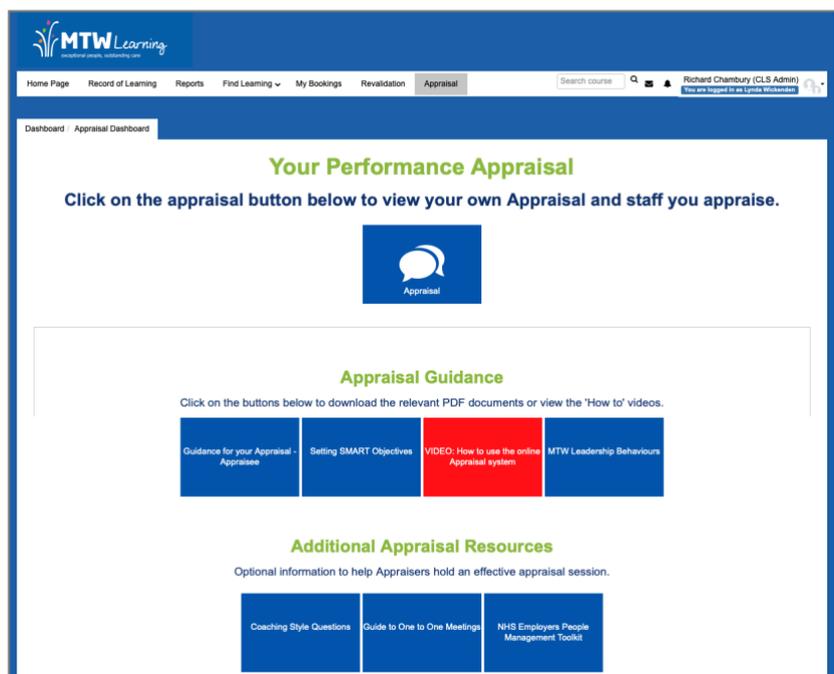
Due to the ease of setting up the online form, the Trust were able to rapidly implement the new system and launch this across the organisation with minimal staff training. Staff now have their appraisal stored in a single 'safe' place that will follow them around the organisation should they move role.

Managers are able to access their team's training data as part of the appraisal process with the forms. The process is linked to staff's statutory and mandatory training records enabling instant confirmation that staff are compliant rather than relying on staff bringing their evidence and certificates to the discussion thus saving time and effort. The Trust has also been able to tailor form content to specific staff group needs to meet local and professional body requirements.

There are no more 'lost' emails and duplication of effort. HR administration has been dramatically reduced. Completions are automatically logged. Compliance reports are real time and accurate. Totara sends out automated emails to inform staff of when they need to complete their online appraisal, to remind managers to complete the process and 'next year' on their anniversary so they can build the process into the annual process.

The Trust's compliance target was met in half the time of previous years paper chasing processes. At the time of writing appraisal compliance stands at 86% just 7 months into the first year.

HR can now concentrate on the quality of the process rather than administrating the quantity and Learning and Development can export training requirements to collate digitally for the annual training plan without additional data input.

A screenshot of the MTW Learning Appraisal Dashboard. The interface is blue and white. At the top, there's a navigation bar with 'Home Page', 'Record of Learning', 'Reports', 'Find Learning', 'My Bookings', 'Revalidation', and 'Appraisal'. Below this is a 'Dashboard / Appraisal Dashboard' header. The main content area is titled 'Your Performance Appraisal' and includes a call to action: 'Click on the appraisal button below to view your own Appraisal and staff you appraise.' A large blue button with a white speech bubble icon and the word 'Appraisal' is centered. Below this is an 'Appraisal Guidance' section with the text 'Click on the buttons below to download the relevant PDF documents or view the 'How to' videos.' There are four buttons: 'Guidance for your Appraisal - Appraisee', 'Setting SMART Objectives', 'VIDEO: How to use the online Appraisal system', and 'MTW Leadership Behaviours'. The 'VIDEO' button is highlighted in red. At the bottom is an 'Additional Appraisal Resources' section with the text 'Optional information to help Appraisers hold an effective appraisal session.' and three buttons: 'Coaching Style Questions', 'Guide to One to One Meetings', and 'NHS Employers' People Management Toolkit'.

However, the greatest benefit is that all staff now have equitable access to an appraisal and development discussions. The Trust have added resources to dashboards within the Totara Learn based MTWLearning to support staff in how to hold an effective conversation, coaching questions and linking to useful websites for further information. It has enabled the Trust to really start to drive the quality of the process and gain a strategic picture of where staff see themselves in terms of talent management and career progression by integrating these conversations into the system.

“I found the system really great – straight forward and very helpful to the process.and I’m a technophobe, so if I can use it and like it, then that says something!”

Lynne Sheridan, Head of Delivery Development, Maidstone and Tunbridge Wells

“It really is all about the cliché of working smarter not harder. Utilising the wider functionality of our Totara based MTWLearning system supported by Chambury Learning Solutions has fast tracked our organisation in the use of technology enhanced learning and development.”

Jeanette Barlow, Head of Learning & Development, Maidstone and Tunbridge Wells

About Chambury Learning Solutions

Chambury Learning Solutions works with organisations that are looking at how technology can assist them to develop their learning, organisational development and staff performance systems.

They work with you to ensure that the system fits the local need. Their extensive experience spans public and private businesses with a specific focus on Healthcare.

Chambury Learning Solutions prides itself on high levels of customer service providing an individual service tailored to each client’s needs, all at a cost effective price to meet your local budget.

