

E2

**FINANCE
INNOVATION
FORUM**

ACHIEVING SUCCESSFUL PLICS ENGAGEMENT - A STORY OF CONTINUOUS INNOVATION

LEEDS TEACHING HOSPITALS NHS TRUST

NORTH EAST AND YORKSHIRE, ACUTE

With special thanks to this team of innovators for taking part in the pilot of this programme and contributing to its development.



**FOR INFORMATION ON THE
INNOVATION PROGRAMME
CLICK HERE**

THE INNOVATORS

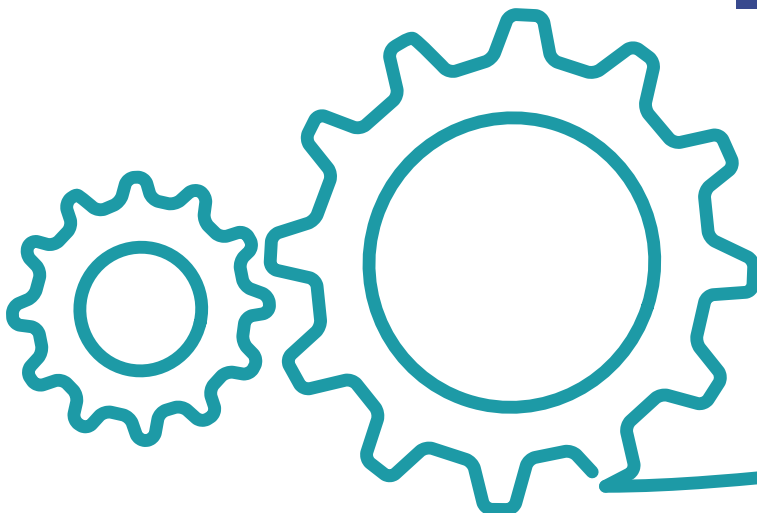
This submission was written by David Tunstall, senior cost accountant at Leeds Teaching Hospitals NHS Trust. The costing team's continued focus on development, engagement and innovation has made it one of the leading lights of costing in the country, demonstrating the tangible benefits and real-life applications of patient level information costing system (PLICS) outputs.

THE PROBLEM

The Trust's costing team needed to improve the level of engagement with PLICS in order to support the waste reduction programme, improve the quality of information available for decision making and maximise the use of this uniquely powerful data source. Otherwise, their PLICS data would be underutilised and not achieve its full potential.

THE CHALLENGES

- How might we provide assurance on the quality and accuracy of our PLICS information so that users have confidence to use it to make informed decisions?
- How might we enhance its content to broaden its potential uses in areas not previously associated with PLICS?
- How might we improve its presentation so that users can utilise it in a way that provides actionable insight to their services?
- How might we improve the communication around its uses so that a wider audience becomes aware of its benefits?



THE INNOVATION

Building confidence in our outputs

We began initially by working with a small number of clinical pilot sites, taking the approach of total transparency and rapid development turnaround to maintain momentum in the improvement of our outputs. Having clinical and operational colleagues point out the flaws and for them to see these corrected created joint ownership and assurance in the final product, reinforcing that PLICS is not just a finance tool.

Equipping our costing team with new data skills

We realised that to achieve PLICS growth, we would need to take advantage of, and increase access to, the clinical data sets it relies upon. To do this, we needed to improve our knowledge of structured query language (SQL) and found a free online SQL training resource through the Khan Academy.

Undertaking this additional training and supplementing it with in-house knowledge that already existed equipped all members of our team with:

- an increased ability to access huge amounts of clinical and non-clinical information
- a better understanding of what the data contains, and consequently a better conversation with operational staff
- an ability to manipulate and link different datasets to provide tailored, meaningful information as part of the engagement process.

Transforming data into information

Recognising that growth in PLICS could be achieved by placing a spotlight on clinical data, we realised that this type of information was not easily visible within the dashboards provided by our costing system provider which inevitably had a 'finance' focus. To overcome this constraint, we decided to

'think outside the box' and create our own 'PLICS opportunity scoper' tool that allowed us to fulfil our ambitions. We publish these monthly alongside our PLICS dashboards and they present finance, clinical and external benchmarking data all into one 'easy to use' package that flags areas of potential opportunity. Excel know-how together with our improved SQL

skills were crucial to creating something that:

- presents our data graphically in a logical order and across different tabs so that users don't get lost in the data
- provides linked filters and slicers to drill into the information presented
- offers financials alongside meaningful data to understand cost using a clinical language.

Improving awareness

We had to raise awareness of the power of PLICS and how it could support improvements to patient services. Emails, demonstrations and training sessions partially addressed this, but we realised that these traditional approaches only covered a small proportion of potential users. However, by setting up a Twitter account (@LTHTCostingTeam), we were able reach a much wider internal clinical and departmental audience than previously possible. This new audience saw the parallel potential benefits of our data through the work we'd done, but also reached national bodies such as the HFMA and NHSE&I who were interested to follow what we were trailblazing. To date, we have over 600 followers, who have helped us immensely particularly with glowing testimonials from having worked with us.

THE LESSONS LEARNT

As an evolutionary path towards greater engagement, there were decisions we made about the nature and focus of our engagement strategy based on what we knew at the time which were less successful. We considered how our message and content was being communicated. We considered and tested a number of approaches to answer questions such as:

- Do we just need to provide direct access to our dashboards for people to see their information in full, or does this provide too much information?
- Do we just send an email message to say 'here it is', or do we sell it to people on the basis that it can identify (or even has identified) potential savings for people to go check out?
- What content would make a busy service manager follow a link to the information, and when they got there, what would make them interested in staying?
- Do we need to provide different information to our finance teams than to our operational managers?

Each stepping point along our journey has helped us develop and refine what we now do, and cumulatively adds to our overall growth and understanding both as a team and information provider. Each of those lessons has been important and has already allowed other trusts that have approached us to learn from our experiences.

We learnt:

- the power of using pilot sites to improve the quality of information
- the necessity of being able to turn around improvements quickly to maintain momentum and insight into the way operational areas wanted to use the information
- up-skilling the team with SQL knowledge massively increased our ability to access, understand and manipulate data. This expanded our traditional finance skillset and helped build confidence in dealing with clinical data and rapport with operational staff
- to improve engagement we needed to improve the accessibility and presentation of PLICS to allow users to focus on what they needed, rather than having to manipulate the data themselves
- relying on traditional forms of communication, such as email, only reached a small proportion of potential users.

Whether helping investigate efficiency and waste reduction opportunities, highlighting clinical coding and income recovery opportunities, evaluating clinical pathways or contributing to clinical audit and performance measures, PLICS data is cross functional.

THE OUTPUTS

Our outputs from a growth in engagement include:

- a diversity of users, 'repeat customers' as well as those referred to us or recommended to us by their peers
- increasing approaches from both clinical and operational colleagues to support them in making use of PLICS and our skills of accessing and transforming data
- an expanding range of opportunity seeking tools born from increasing engagement. These have led us to the worlds of population health management and trust wide quality improvement (QI) initiatives, all of which have proved integral to improving the services we provide to patients and their experience
- data and team members cited as contributors to increasing numbers of published clinical studies.

THE OUTCOMES

The tangible and intangible outcomes of our work include:

- a growth in the recognition in the 'art of the possible' from challenges presented by those seeking out and engaging with PLICS
- clinicians becoming more interested in how they could use the data. For instance, in validating the cost benefits of alternative patient pathways. The demands for more data and insight always lead to our next innovation
- streamlined production methods to become more efficient to cope with the growing numbers of colleagues approaching us. The way we work has been transformative to the team and its skills, and the demand for the information we produce is continuing to increase making it a sustainable change
- the creation of a 'data lake'. This continually updated repository of clinical and financial information allows a quick turnaround of requests which allows more time to focus on answering the questions rather than collating data
- enhanced reputation and visibility both in the Trust and nationally, with requests to contribute to articles for the HFMA, FACE and FFF
- reaching a new clinical audience that bring with them new challenges that drive continuous learning and innovation
- the entire team feeling empowered and realising they can play an important role in using their skills in a 'back office' function to improve patient care.

THE QUICK WINS

We recently published an article through the FACE Journal to share our lessons and advice (link: <https://onenhsfinance.nhs.uk/wp-content/uploads/2021/11/Our-Journey-to-Successful-PLICS-Engagement.pdf>), which can be summarised as:

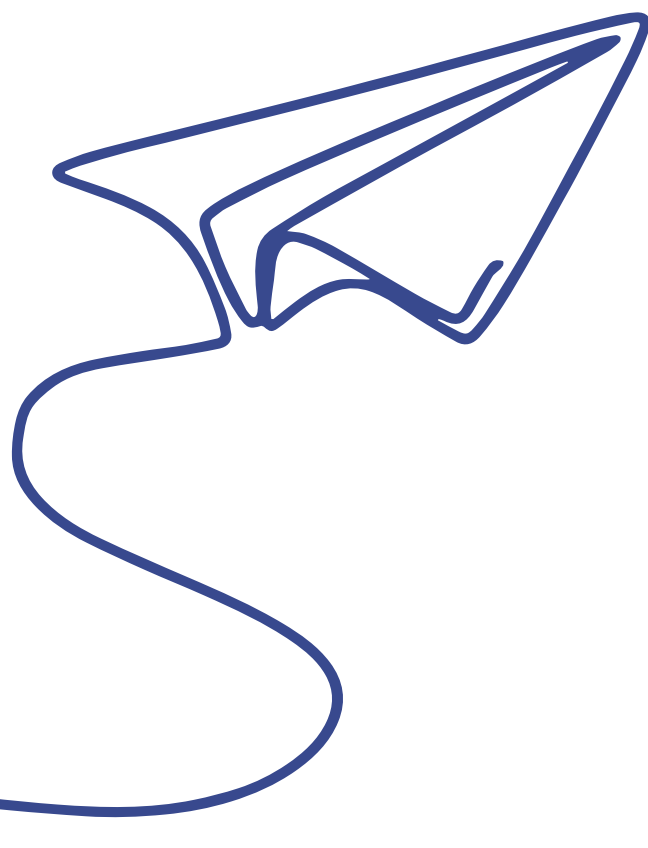
- gain assurance on your outputs
- make use of SQL and appreciate the key importance of data outside of 'finance'
- tailor and improve the presentation of your information
- collaborate widely
- communication and publicity is important.

THE REVIEWERS SAID

“LEEDS HAS MADE GREAT PROGRESS IN CLINICAL ENGAGEMENT AND SHOULD BE RECOGNISED AS A PIONEER IN THIS FIELD USING DASHBOARDS, TWITTER AND UPSKILLING THE TEAM WITH SQL. WELL DONE!”

“CLEAR EVIDENCE OF THE IMPACT OF ENGAGEMENT WITH CLINICAL COLLEAGUES OVER A SIGNIFICANT TIME PERIOD. THIS IS AN INDICATION OF CLINICAL CONFIDENCE IN THE DATA CHANGES.”

“THIS COULD BE BUILT AND GROWN INTO OTHER AREAS AND IS A VERY GOOD USE OF SQL.”



WHAT YOU CAN DO NOW

SUBMIT INNOVATION

If you recognise the problem stated and have implemented your own innovation to overcome it please submit this innovation to the programme and give others more examples to learn from.

REGISTER INTEREST

If you recognise the problem stated and would like to know more details about this innovation in particular, we will be hosting showcase and workshop sessions throughout the year, so all interested staff can gain ideas and inspiration from innovators in a manageable one-to-many format.

SUBMIT PROBLEM

If you have a problem but don't currently know of a solution to it, then please submit it here and in 2022 the Forum intends to crowdsource solutions to problems that don't currently have known innovations.

LEARN MORE

If you would like to learn more about about the innovation programme please click for more details.

ENDORSEMENT DISCLAIMER

The Finance Innovation Forum's Innovation Programme asks NHS Finance peer reviewers whether the "Innovation overcomes, successfully addresses, or solves the problem identified". The programme does not endorse, recommend or provide any assurance of software used or mentioned in any of the published innovations. If you think a published innovation is being used to falsely validate a commercial product or company please contact finance.innovation@nhs.net



IN SEPTEMBER 2021 THE FORUM LAUNCHED...

- A national Innovation Programme for NHS Finance staff to submit their innovations for peer review. Successful innovations will be published and accessible to all on the One NHS Finance website
- A 'Software Skills For Finance Staff' event series taught by NHS Finance for NHS Finance including MS Excel, PowerBI, SQL etc.
- An 'Art of the Possible' briefing which explains two new technologies AI & Blockchain and discusses the opportunity for NHS Finance
- An Automation Group to review and improve the efficiency of existing national processes and returns

WHAT YOU CAN DO NOW

- Submit your innovations for peer review
- Sign up to be an innovation peer reviewer
- Read Art of the Possible
- Sign up for Software Skills for Finance
- Register your interest in automation and all things innovative

Innovation Programme



Software Skills



Automation sign up



Be a peer reviewer



Art of the Possible



FURTHER INFORMATION

Website: FinanceInnovation.nhs.uk

Email: FinanceInnovation@nhs.uk

LinkedIn: [One NHS Finance](#)

Twitter: [@OneNHSFinance](#)



One NHS Finance brings together the Future-Focused Finance, National Finance Academy, and the Finance Innovation Forum programmes and networks to make sure that everyone working in NHS Finance has access to skills, knowledge, methods, and opportunities to influence and enhance patient services.



Identifying and developing innovative ways of working and new areas of improvement.