## Executive Summary

This report provides the Trust Board with information and assurance on key workforce metrics and an update on key workforce matters. In relation to Key Performance Indicators, the reports sets out that:

- Sickness Absence Rate (both rolling and monthly figure) have improved over the last month;
- Normalised Turnover has improved over the last month and is below target.
- The Appraisal rate remains constant and is exceeding the target of 90%.
- There has been a slight deterioration in the Mandatory Training compliance rate, which at 97% remains above target.
- The retention rate at 24 months has reduced slightly to 83.36%.
- Due to a number of factors, the vacancy rate has increased in month. This is, in large part attributable, to the budget setting at year end and changes to the treatment of secondments and recharges as the Trust moves to ESR establishment control.

The report offers a brief overview of a number of key areas of work:

- Workforce Directorate:
  - Staff Engagement remains high when considering the Staff Friends and Family Test results and the recently released benchmark from comparator Trusts.
  - The launch of new staff benefits; Green Car Scheme, Technology Benefits and Neyber Financial Products (education, loans and savings).
  - Radiology Recruitment Day and Planned Recruitment Day for Renal Nursing.
  - Launch of e-job planning and Allocate revalidation for medical staff.

### Action Requested:

- Receive and noted

### For the attention of the Board

The report provides an update on activity to reach Trust targets on the Workforce Metrics measuring the delivery of the People and Organisation Development Strategy 2016 - 2020

**Assure**

- Actions on Recruitment, Retention and Engagement to mitigate SR1 on Board Assurance Framework.

**Advise**

- Progress on delivery of the actions within the People and Organisation Development Strategy 2016 – 2020 to support with the approach to OD.
<table>
<thead>
<tr>
<th>Alert</th>
<th>The Trust performance on 12 month rolling sickness absence against target is red rated.</th>
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<tbody>
<tr>
<td>Author + Contact Details:</td>
<td>Adam Race, Deputy Director of Workforce Tel 01902 695430 Email <a href="mailto:Adam.Race@nhs.net">Adam.Race@nhs.net</a></td>
</tr>
<tr>
<td>Links to Trust Strategic Objectives</td>
<td>4. Attract, retain and develop our staff, and improve employee engagement. 6. Be in the top 25% of all key performance indicators.</td>
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<td>Resource Implications:</td>
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</tr>
<tr>
<td>Report Data Caveats</td>
<td>Data for this report is taken in large part from the Trust's Electronic Staff Record. This is a standard report using the previous month's data. It may be subject to cleansing and revision.</td>
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<td>CQC Domains</td>
<td>Well-led: the leadership, management and governance of the organisation make sure it's providing high-quality care that's based around individual needs, that it encourages learning and innovation, and that it promotes an open and fair culture.</td>
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<tr>
<td>Risks: BAF/ TRR</td>
<td>BAF Strategic Risk SR1 – Workforce</td>
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<tr>
<td>Risk: Appetite</td>
<td>The report seeks to provide Board Assurance and to decrease the Workforce Risks within the Trust.</td>
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<tr>
<td>Public or Private:</td>
<td>PUBLIC</td>
</tr>
<tr>
<td>Other formal bodies involved:</td>
<td>Workforce &amp; Organisational Development Committee (WODC)</td>
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<td>References</td>
<td>NONE – National Workforce Strategy currently in consultation phase.</td>
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| NHS Constitution: | In determining this matter, the Board should have regard to the Core principles contained in the Constitution of:  
  - Equality of treatment and access to services  
  - High standards of excellence and professionalism  
  - Service user preferences  
  - Cross community working  
  - Best Value  
  - Accountability through local influence and scrutiny |
Executive Summary Workforce Report

Trust Board 1st July 2019

Alan Duffell
Director of Workforce
This report provides the Trust Board with information and assurance on key workforce metrics and an update on key workforce matters.

- Three of the six workforce indicators have seen an improvement over the last month; Sickness Absence Rate, Normalised Turnover and Vacancy rate. The Appraisal rate remains constant, whilst there is a slight deterioration in the Mandatory Training compliance rate, which at 96.5% remains above target. The retention rate at 24 months has reduced slightly to 83.33%.

- Normalised turnover has reduced and is below target at 8.89%.

- The bank saw a slight reduction in size in May and the number of these staff actively working has also reduced slightly. This has not prevented the bank from responding to the increased demand with high fill rates in May. Further work is being undertaken to increase both the number of staff registered with the bank and the number of those registered actively offering work.

- Attendance levels have improved significantly in month as seasonal effects on absence diminish. The rolling 12 month sickness absence figure has also improved, continuing the trend of gradual improvement against this indicator. Actions include continued focus particularly on long term absence, and the development of the Wellbeing approach in respect of which an update was be presented to the Workforce and Organisational Development Committee in April.

- Performance has deteriorated slightly in relation to Mandatory Training compliance, however, all clinical divisions are performing well and in excess of the target for generic mandatory training and the Trust’s overall performance is now meeting the target. Despite significant improvements more work continues to be necessary in Black Country Pathology Service in particular and in relation to role specific training across Divisions.

- Appraisal compliance has remained constant and is achieving the Trust target.

- Staff engagement continues to be high and the staff FFT results from Q4 2018-19 for which benchmark data has recently been made available compare favourably. The same survey is out for Q1 2019-20 currently.

- The report offers a brief overview of a number of key work streams:
  - Leadership and Staff Engagement including a number of staff benefits such as Neyber Loans and the Royal Awards held earlier this month
  - Key areas of recruitment including the NHSI Nursing Retention Plan, Recruitment Days with significant success in Radiology, the Clinical Fellow Programme and streamlining efficiencies in the process
  - Developments in relation to education and wellbeing, such as the introduction of e-learning for induction, the development of the Trust’s approach to health and wellbeing together with details of contracts won by Occupational Health
  - Productivity developments such as the enhanced deployment of ESR and implementation of e-Job Planning and e-expenses
Of the six key workforce indicators, three have shown an improvement in performance over the last month. There has been an improvement in turnover rate, sickness absence and vacancy. 24 month retention and mandatory training rate have diminished slightly, whilst the appraisal rate has remained constant.

The vacancy rate is above the new lower target, and whilst it has reduced in May (from April) has increased in 2019/20 due to the budget setting round and treatment of some aspects of the staffing establishment.

Attendance levels have improved both when considered over the rolling 12 month period and in-month. Actions include continued focus particularly on long term absence, monthly sickness absence workshops in the divisions and a long term sickness absence tracker in Division 1.

Mandatory training (generic) compliance rates have deteriorated slightly in month although continue to meet the 95% target. There is further work to do in relation to role specific training and in BCPS where performance has been challenging as a result of poor performance pre-transfer and access issues post transfer. The access issues are now resolved and this will be robustly managed through the divisions.

Appraisal compliance is meeting the Trust target.
Summary Update

Leadership Development Approach

The Trust has approved the Leadership Development Approach through the Workforce and Organisational Development Committee which now includes a newly developed management competence matrix. This will be fully launched by August.

Staff Friends and Family Test

The previous quarter staff FFT results are shown together with newly available national benchmarking as part of this report. This shows positive results for the Trust. The current (Q1) Staff FFT survey closed on 30 June and results will be reported as part of the next report. These results will be considered by the Staff Survey Oversight Group together with results from the National Survey.

From Q2, along with the staff FFT a small number of local ‘pulse’ questions will be asked as part of this survey.

Staff Benefits

There are a range of staff benefits available currently within the Trust and these are in the process of being further enhanced. From 14 July 2019 the Trust will launch a range of additional benefits to support staff:

• Green Car Scheme – in addition to the current salary sacrifice car scheme, a new green car scheme will be launched. This will enable staff to access energy efficient cars in a cost effective way, benefiting from the reduced tax implications on this type of vehicle when compared with a standard vehicle.
• Home Electronics Scheme – this scheme is a further improvement on the previous scheme with open access throughout the year.
• Neyber Financial Wellbeing support. Neyber offer a range of products from financial education, loans at competitive rates and savings products.

The communications plan associated with these products has been developed ahead of the launch.

Talent Management Approach

The Trust’s approach to Talent Management has been developed as part of the Trust’s Education and Training Strategy. This approach to talent management will be reviewed through the Academy Steering Group in July and reported to TMC and the Workforce and Organisational Development Committee following that review.

Royal Awards

Earlier this month the Trust’s annual awards ceremony, the Royal Awards, were held at Grand Station. This ceremony took on a different format in 2018 with 200 staff (shortlisted nominees and winners) being in attendance and the winner being announced on the night.
Staff Engagement and Leadership

Key Issues & Challenges

- Areas for targeted action to deliver improvements have been identified at Trust, Division and Directorate Level.
- This has identified at Trust Level:
  - Equality Diversity and Inclusion
  - Immediate managers
  - Safe environment – bullying and harassment
  - Safe environment – violence
- Through the staff survey operational group, Divisions have submitted detailed action plans for each of their directorates.

Key Actions & Progress

- There is a detailed, corporately led, action plan dealing with bullying and harassment.
- There Equality, Diversity and Inclusion Steering Group has considered its focus areas and is developing actions to improve both education and general awareness of EDI issues.
- The Leadership Development Approach has been further developed to include a competency matrix for line managers and this approach will be fully launched over the summer.
- A working group to further develop actions to support a reduction in violence and aggression has been established – this will report back in October.
- Having identified priority areas for action posters have been developed to communicate widely with the staff.

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No. of Themes worse than the national average & worse than RWT: 0 3 3 5 0 11
Staff Engagement

Key Issues & Challenges
• Credible response rate, however could be further improved upon.
• Maintaining a balance between regular pulse surveys and staff survey fatigue with insufficient time to act.

Key Actions & Progress
• The Care FFT score for the Trust of 88% compares favourably with the national average of 81%.
• The Place to Work FFT score of 78% also compares favourably with the national average of 64%.
• Actions to respond to the Staff FFT and being developed through the Divisions and the Staff Survey Oversight Group.
• Further short ‘pulse’ survey questions to be developed ahead of next quarter,

Update
• The Staff Friends and Family Test is an opportunity for all staff to give their view on the Trust as a place to work and receive treatment.
• The last quarter reported (Q4 2018-19) received 1705 responses, 18.3%, the highest ever achieved.
• The Q1 survey closed on 30 June 2019 and results will be reported to the next meeting.
Summary Update

Retention Plan

The Board will be well aware that the Trust has an established 12 month retention plan. This plan, which is ostensibly focussed on Nursing (as required by NHS Improvement) focusses on a number of key domains:

• Flexible Working and Work life Balance
• Professional Development and Progression and
• Better understanding our data

Actions are well underway in this area this, 'data led' approach is being applied to other areas to determine whether and to what extent the plans developed in Nursing will have impact in other areas. Further reports on this will be made to the Workforce and Organisational Development Committee in August.

Recruitment Days

A recruitment open day was held in May for radiology staff (radiographers). This event was incredibly well attended and resulted in 137 applications to Band 5 posts and 59 applications for Band 6 posts. From this exercise offers have been made to one senior radiographer at band 6 and seven band 5 radiographers.

Looking forward, a recruitment day has been arranged for Renal nursing. This will take place on 11 July and the event will enable potential applicants a tour of the service and an 'interview on the day' service.

DBS Checks in TRAC

The Trust has with effect from 14 June 2019 implemented DBS checks via TRAC, the Trust’s applicant management system. This means that the process of applying for DBS checks is now fully contained within TRAC reducing the need for candidates to input data in connection with their DBS check into another third party system. It is anticipated that this will improve the candidate experience and further streamline this process.

Employee On-Line

As part of the ongoing commitment to increasing the use of technology the Trust has recently undertaken an upgrade to the HealthRoster software. This upgrade enables the Trust to deploy Employee On-line with increased functionality for online shift booking and efficiencies in the timesheet process. Further information will be available as part of the roll out of this aspect of the service.
Attract, Recruit & Retain

Key Issues & Challenges

- The Retention Rate at 24 months has reduced marginally (from 83.36% to 83.33%) despite modest improvements in 12 and 18 month retention rates and improvements in normalised turnover.
- Over the turn of the financial year the vacancy rate overall has increased as a result of a number of factors:
  - A number of posts have been added into the establishment as a result of 2019/20 budget setting and funding of historical cost pressures
  - As a result of a move to use ESR establishment control to report vacancies the treatment of recharges and secondments has been reviewed the treatment previously applied had the effect of slightly underreporting vacancy levels
  - The effect of this is an increased vacancy rate (despite increases in the number of staff employed) against a reduced target for this indicator.

- Turnover has further reduced from 10.42% to 10.10% and there has been a corresponding reduction in normalised turnover to 8.89% over the last month, continuing the gradual downward trend.
Attract, Recruit & Retain

**Vacancy Rate: Rolling 12 Months**
Nursing & Midwifery, Medical & Dental, and AHPs
Budgeted WTE vs Staff in Post

**Normalised Turnover: Rolling 12 Months**
Nursing & Midwifery, Medical & Dental, and AHP

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**Key Issues & Challenges**

- There remains work to do in relation to the 24 month retention rate for AHPs and Nursing and Midwifery Staff.
- As on the previous slide vacancy levels have reduced in month after an increase around the year end.

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**Key Actions & Progress**

- Despite challenges with the 24 month retention rate, other indicators in relation to the attraction and retention of staff are performing well with below target performance in relation to turnover rates for all three key clinical staff groups.
- Turnover has fallen for all staff groups over the last month and remains below target.
- The Trust’s 12 month Nursing retention plan continues to be progressed with actions being taken in line with this plan and plans for other staff groups being developed.
Attract, Recruit & Retain

Key Issues & Challenges

- BCPS, which is reported separately from Division 1, is showing increased levels of turnover. This is particularly down to Medical Laboratory Assistants in microbiology and cellular pathology. Service impacts are mitigated by bank staff and BCPS has an engagement plan in place alongside the changes to service across pathology. A detailed update on this has been provided to the Workforce and Organisational Development Committee in June.

Key Actions & Progress

- Overall turnover rates are below target for all Divisions.
- Nursing turnover rates in all divisions have seen improvements and are now close to, or below the new lower target.
- Nursing turnover hotspots in Division 2 have been identified and actions are being developed with the staff to support improvements in retention. Block bank bookings are in place to support continuity of care together with targeted recruitment as in Renal Nursing with an open day on 11 July 2019.
Key Issues & Challenges

- The number of staff registered with the bank only (i.e. without a substantive post) has reduced slightly over the last month with relatively modest starters to bank only posts.
- The number of staff on the bank actively working in May has reduced slightly when compared with April.

Key Actions & Progress

- Further recruitment events are planned over the year to grow the bank including collaborative recruitment events with Walsall Healthcare in September.
- A survey of bank only staff will be undertaken in August to understand their motivation for bank work. This will be reported through the Attract and Retain Group.
- The number of staff joining the Trust continues to exceed the number of staff leaving the Trust for each of the last 12 months.
Attract, Recruit & Retain

**Key Issues & Challenges**

- Temporary Nurse Staffing demand increased in May, albeit not to as high levels as prior months.
- The bank fill rate for medical staff has reduced to 46%.

**Key Actions & Progress**

- Demand for temporary staff appears to be generally reducing across staff groups.
- There has been an increase in the, already extremely credible, bank fill rates for nursing posts (91% registered, 95% un-registered).
- The updated version of the nursing rostering software was successfully deployed. This will allow for employees to book bank shifts on-line through self booking and increase fill rates. This aspect will be deployed in July.
Summary Update

E- Induction

The Trust is moving to e-induction for the more routine (mandatory training) elements of the induction process. There have been significant enhancements in relation to the quality and availability of e-learning in respect of mandatory training in recent years, that coupled with the Trust’s move to e-learning based in OLM (part of the ESR suite of employment records) enables a shift to the delivery of mandatory training by e-learning as part of induction.

From August those joining the Trust will be encouraged to undertake elements of their induction on-line prior to joining the Trust freeing up valuable time to properly orient themselves to the Trust and to be present in their place of work sooner.

Health and Wellbeing

The Trust’s Health Wellbeing Approach is in the late stage of development based around five pillars of wellbeing; Career Wellbeing, Emotional Wellbeing, Physical Wellbeing, Financial Wellbeing and Community and Social Wellbeing. The Trust’s strategic approach and priorities in each of these areas has been developed by the Health and Wellbeing Steering Group which comprises a multidisciplinary team from across the Trust.

As part of this work and in response to the report from the commission from Health Education England there will be a session to raise awareness of mental health and wellbeing in the WMI on 9 July 2019.

Occupational Health Contracts

The Occupational Health team have had significant success in recent contract award being awarded the contract for Stafford and Cannock Councils. These clients are seeking increased support in respect of pro-active health and wellbeing activity.

In addition to this, the Trust has entered into a contract with Compton Care to provide Occupational Health Services. Both commercial contracts commence from 1 July 2019.

Finally, the OH services will be working closely with colleagues at Walsall Healthcare NHS Trust (WHT). The RWT OH department has been commissioned to provide 2 days per week Band 6 Occupational Health Nurse cover together with senior support to WHT in connection with their SEQOHS accreditation process.
Staff Training & Development

**Key Issues & Challenges**

- Whilst the progress in relation generic mandatory training has been significant and maintained, role specific training compliance has yet to achieve the aspirational internal target.
- The Trust remains below the trajectory for delivery of the 204 apprentices in 2019/20 as at month 2. Divisions have been asked to ensure apprenticeships are appointed whenever possible.

**Key Actions & Progress**

- Performance on Generic Mandatory Training remains above target. All divisions are now exceeding the internal 95% target, with the only challenged area being BCPS (where performance has deteriorated).
- The reasons for BCPS’s continued underperformance are being explored ahead of the next report.
- Letters have been sent to all staff where they are not compliant with any aspect of mandatory training.
Staff Training & Development

Key Issues & Challenges

- Only BCPS continues to show showing significant underperformance in generic mandatory training from the internal 95% target, however performance is such that in this area it is below the 85% revised target.
- There have been slight reductions in the generic mandatory training overall and in all divisions.

Key Actions & Progress

- Sustained improvements have been made in relation to generic mandatory training with all divisions demonstrating compliance rates in excess of the target.
- There have been significant improvements in all areas for role specific training with Estates and Facilities and Division 3 achieving the internal target of 95%.
- Regular detailed reporting of mandatory training compliance is in place to enable this to be much more closely monitored.
Staff Training & Development

Key Issues & Challenges

• BCPS continues to be challenged in relation to appraisal compliance rates.
• Pre transfer a number of the sites operated on the basis of all appraisals to be completed between April and June. As a consequence of this, there were 149 appraisals due in May and June to maintain current performance. This has resulted in diminishing performance in BCPS’s appraisal compliance rate. Further action is needed to address this diminishing performance.

Key Actions & Progress

• The overall compliance rate target for Appraisals has been met for the month of May, with the previous improvement sustained. Divisions 1, 3 and Estates and Facilities achieving the target.
• There have overall improvements in Division 2 and Corporate areas remain broadly stable.
• The Trust’s new appraisal policy has now been approved and is effective from May 2019.
• Recovery actions are now needed for BCPS given the large number of appraisals due in the first quarter of 2019/20.
Key Issues & Challenges

- Despite improvements in the in-month position, the less sensitive rolling 12 month absence rate remains above the Trust target at 4.03%.
- This marks a slight decrease in the rolling 12 month absence rate indicating continued improvement in performance overall.

Key Actions & Progress

- In month sickness absence has improved markedly over the last month.
- All divisions hold monthly attendance workshops to ensure robust management of sickness absence.
- The Workforce Wellbeing Steering Group have developed the Trust’s ‘Wellbeing Approach’. This, together with the delivery plan will be fully consulted upon and presented to the August Workforce and Organisational Development Committee.
Health & Wellbeing

Key Issues & Challenges
Sickness absence levels are improving in all divisions, but remain high in Divisions 1 and Estates and Facilities.

- The board has requested an update in relation to Estates and Facilities and this has been considered at the Workforce and Organisational Development Committee in June 2019.

Key Actions & Progress
Increased focus on long term sickness, particularly in Divisions 1 and Estates and Facilities.

- Division 1 have developed a Long Term Absence Tracker to ensure timely robust action is taken in all cases.
- Work is being undertaken through performance meetings to embed the attendance management policy in primary care.
Summary Update

There are a number of pieces of work in relation to productivity, these include:

**ESR Deployment – establishment control**

There is significant work being undertaken to maximise the use of the Electronic Staff Record (ESR) including the deployment of manager and employee self service (giving access to employee records and replacing the need for local change forms). Another key piece of work in relation to this project has been the implementation of establishment control. This gives an accurate understanding of vacancies across the Trust as a granular level and has been enabled through close collaborative working between finance and workforce teams.

There are additional workstreams associated with the e-learning elements of ESR which will require employees to work with the system and enable the Trust to move to electronic payslips in due course.

**E-Job Planning for Medical Staff**

The Allocate Optima software has been launched with e-job planning and revalidation and appraisal modules in the first instance. A number of training sessions for both products were held during June for clinicians and Clinical Directors. Further modules will be rolled out over the coming months, including:

- e-rostering for junior medical staff initially;
- E-leave giving greater transparency into the booking of leave; and
- Alongside the roll-out of these modules, similarly to the approach taken in nursing, access to the system will be available through the Me-App for medical staff.

**E-expenses**

Employee services (payroll colleagues) are working closely with rostering colleagues to fully implement e-expenses. This software, which automates the calculation of journey distances using the correct treatments will increase the accuracy of expense claims whilst reducing the manual administration required to process the claims.
Productivity – e-Rostering

**Unused Hours**

**% Staff on Annual Leave**

**% Rotas Set 6 Weeks in Advance**

Supporting Narrative

- Unused hours remain within the Trust’s threshold. Targeted training sessions have been held with ward managers to ensure this target is met and performance improved upon.
- The Trust target for rosters being set 6 weeks in advance is 90%. In this reporting period the compliance rate was under target with a slight reduction in performance. Non-adherence continues to be escalated.
- Robust exception reporting and escalation processes are in place.
- There have been challenges with managers locking down shifts for payment. As the Trust seeks to take full advantage of the system to generate efficiencies in the processing of pay and booking of shifts, it will be critical that managers get this process right for staff to be paid.
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**Data Owner:** Workforce Planning & Business Intelligence

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<td>803.2 Additional Clinical Services WTE</td>
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<td>803.3 Additional Clinical Services WTE (Ex Permanent, Fixed Term &amp; Locums)</td>
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<td>803.6 Staff in Post - Adjusted for St Helen's employed Rotational Doctors</td>
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<td>803.7 Medical and Dental WTE (Ex Permanent, Fixed Term &amp; Locums)</td>
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<td>150.00</td>
<td>150.00</td>
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<td>803.8 Medical and Dental WTE (Ex Permanent, Fixed Term &amp; Locums)</td>
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**Data Owner:** Workforce Planning & Business Intelligence

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<tr>
<th>Vacancy Rate by NHS Staff Group</th>
<th>31st Mar 2019</th>
<th>Out-turn</th>
<th>Target</th>
<th>2019 - 20</th>
<th>STD Change</th>
<th>Out-turn</th>
<th>Comments</th>
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<td>804.7 Support to Clinical Staff</td>
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**Data Owners:** Finance & Workforce Planning & Business Intelligence

<table>
<thead>
<tr>
<th>Turnover</th>
<th>31st Mar 2019</th>
<th>Out-turn</th>
<th>Target</th>
<th>2019 - 20</th>
<th>STD Change</th>
<th>Out-turn</th>
<th>Comments</th>
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<tbody>
<tr>
<td>806.1 % Total Workforce Turnover (Rolling previous 12 months)</td>
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<td>10.63</td>
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<td>806.3 % Normalised: Additional Professorial, Scientific, and Technical</td>
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<td>806.6 % Normalised: Allied Health Professionals</td>
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<td>9.74</td>
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<td>806.7 % Normalised: Generalist and Allied Health Professionals</td>
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<td>7.88</td>
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<td>806.8 % Normalised: Healthcare Scientists</td>
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<td>806.9 % Normalised: Medical and Dental (Ex Permanent, Fixed Term &amp; Locums)</td>
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<td>806.10 % Normalised: Nursing and Midwifery Registered</td>
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**Data Owner:** Workforce Planning & Business Intelligence

<table>
<thead>
<tr>
<th>Retention Rate (12 months)</th>
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<th>Target</th>
<th>2019 - 20</th>
<th>STD Change</th>
<th>Out-turn</th>
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</thead>
<tbody>
<tr>
<td>806.1 Retention Rate (12 months)</td>
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<td>91.57%</td>
<td>91.57%</td>
<td>91.57%</td>
<td>91.57%</td>
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<tr>
<td>806.2 Retention Rate (24 months)</td>
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<td>84.50%</td>
<td>84.50%</td>
<td>84.50%</td>
<td>84.50%</td>
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</tbody>
</table>

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