




# CONSULT BROCHURE

WORKFORCE OPTIMISATION

SARD Consult

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# We're SARD: **Solving Workforce Challenges**

Every NHS trust faces unique workforce challenges. We understand, because we were born in the NHS. That's why we start by listening and understanding your goals. Only then do we craft a tailored solution that fits your specific needs.

We understand the frustrations you encounter on a daily basis. As a former provider of workforce systems provided as standalone products, we have been able to reflect and admit that traditional SaaS solutions in isolation don't work. We evolved. That's why we pioneered 'Software with a Service' (SaaS), combining innovative software, deep NHS expertise, skills transfer and analytics to together solve your workforce puzzles. Not short term gain, but long term, sustainable fixes.

## **What We Solve**

It is easy to feel overwhelmed by the array of things you need to do but can't. The endless tasks, the constant scrutiny... it's frustrating and can sap the hope from all of us. Whether it be lack of time, tools, resources, or know-how it can create a frustrating cycle of temporary fixes. We understand, because we've been there.

## **The SARD Difference**

We begin every engagement with a deep discovery process, understanding your unique challenges, goals, and how solving them transforms your work. We believe true solutions are tailored to your needs. We take shared ownership of the journey, working side-by-side to turn plans into results. We help you achieve the freedom and relief of confident workforce planning, where the positive impact on patient outcomes is not just imagined but experienced.

## **Our Mission**

To empower the NHS to improve colleague and patient lives. We're your trusted ally. You don't need to face these challenges alone. Together, we can bring practical solutions and the support to achieve lasting change.

# We're SARD: **What we offer**

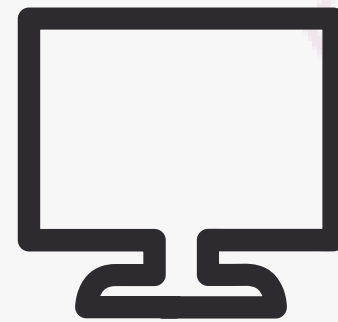
To tackle the complex challenges of NHS workforce optimisation, we offer a comprehensive suite of integrated solutions.

Whether you need strategic guidance, forensic analytics, powerful systems, or targeted training, we have the expertise and tools to help you achieve your goals. We have three main arms to our business, Consult, Systems and Academy. Although you can interact with each independently, it's when we combine them that real change happens.



## **Consult**

Process improvement,  
data-driven insights,  
fostering buy-in.



## **Systems**

Streamlined systems for  
job planning, leave  
management, and more.



## **Academy**

Building workforce  
expertise with tailored  
training programs.

## **Workforce Optimisation Your Way**

Our solutions can be deployed independently to address specific needs, or combined for a full-scale workforce optimisation program. We'll partner with you to create the plan that works best for your trust.

# Introducing SARD Consult

## Your Partner in Workforce Transformation

We're not your typical management consultancy. We aim to understand your unique workforce planning challenges and work side-by-side to develop efficiency, consistency, oversight, engagement, and sustainability. This includes streamlining processes, building reliable systems, gaining clear visibility, fostering staff buy-in, and empowering your team with the skills for long-term workforce management success.

### **Breaking the Cycle**

We know the frustrations: lack of time, resources, and difficulty getting those initial big wins. That's where we excel. Our tailored solutions and skills transfer get you to the summit, empowering your team for long-term success.

### **Simplicity is Key**

Our discovery approach lets us choose the right tools – and create them if none exist. We focus on streamlining processes, making workforce planning achievable for your trust.

### **Flexible and System-Agnostic**

We partner with any trust, regardless of your current systems. Our services include:

- Whole-trust projects
- Support for specific services
- Bespoke solutions tailored to your needs

### **Need a Jumpstart?**

Try our 'Steps to Sustainable Workforce Optimisation' program. It builds a solid foundation and guides you seamlessly through to advanced planning.

# Introducing SARD Consult

## What is Workforce Optimisation

Workforce optimisation is a holistic approach aimed at maximising the NHS's most valuable asset – its people – to ensure the best possible patient outcomes. It's not about time-and-motion studies or quick fixes. Instead, it's about strategically aligning your workforce with patient needs, ensuring you get the most from your resources.

### What It Does

Workforce optimisation helps you

- "Right Size" Your Teams: Match capacity to demand for optimal service delivery.
- Justify Resource Requests: Provide evidence-based support for hiring and strategic decisions.
- Continuously Improve: Identify areas where adjustments maximise patient impact.

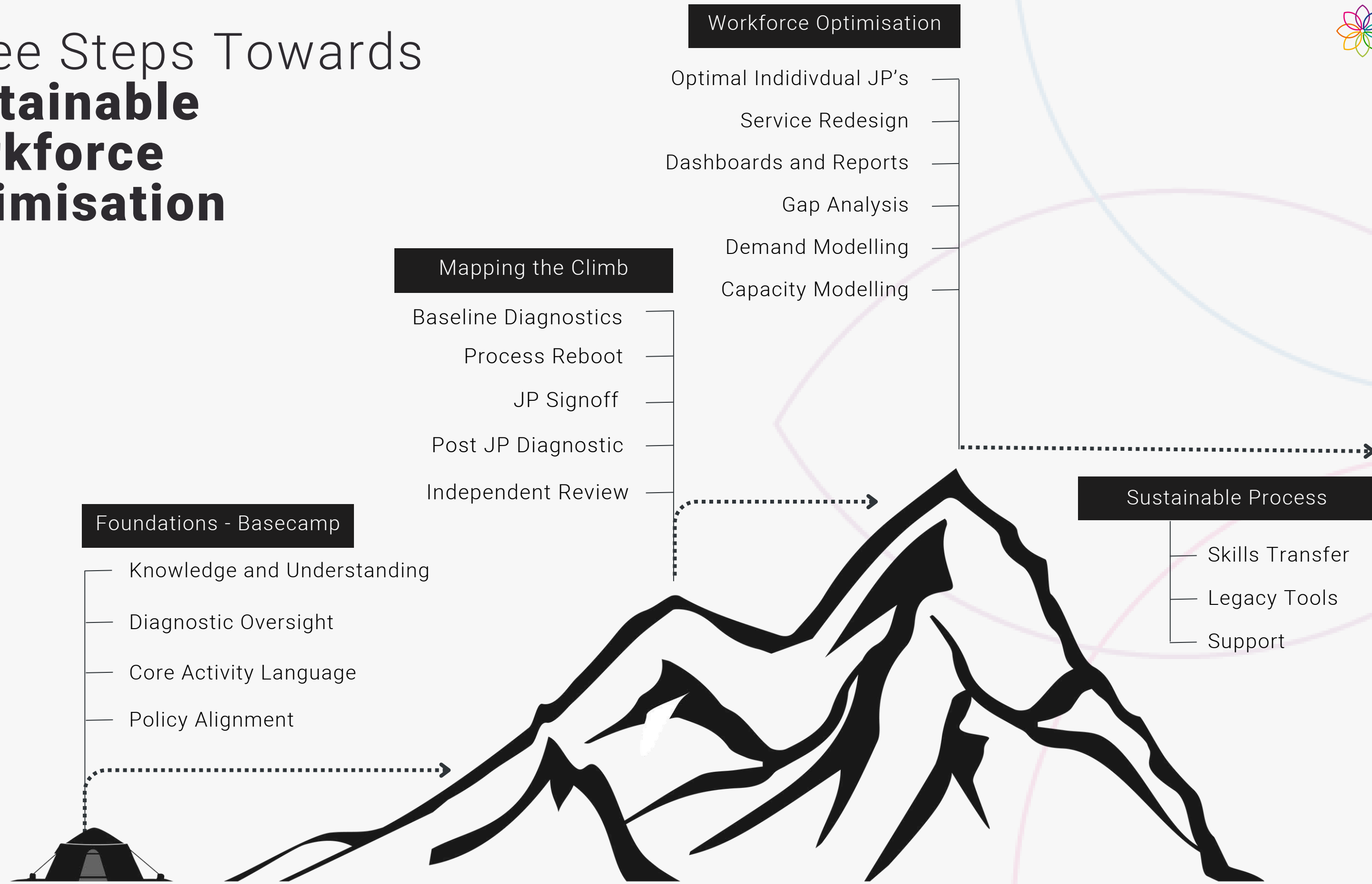
### SARD's Approach

We combine powerful systems, targeted training, deep expertise, and insightful analytics to create a clear picture of your workforce. This empowers you to make the changes needed for long-term success.

### Overcoming Barriers

We understand why workforce planning can feel daunting. Whether it's fear of conflict, lack of clarity, or limited know-how, we partner with you to break down those barriers. Our mission is to equip you with the tools and strategies to achieve lasting workforce optimisation success.

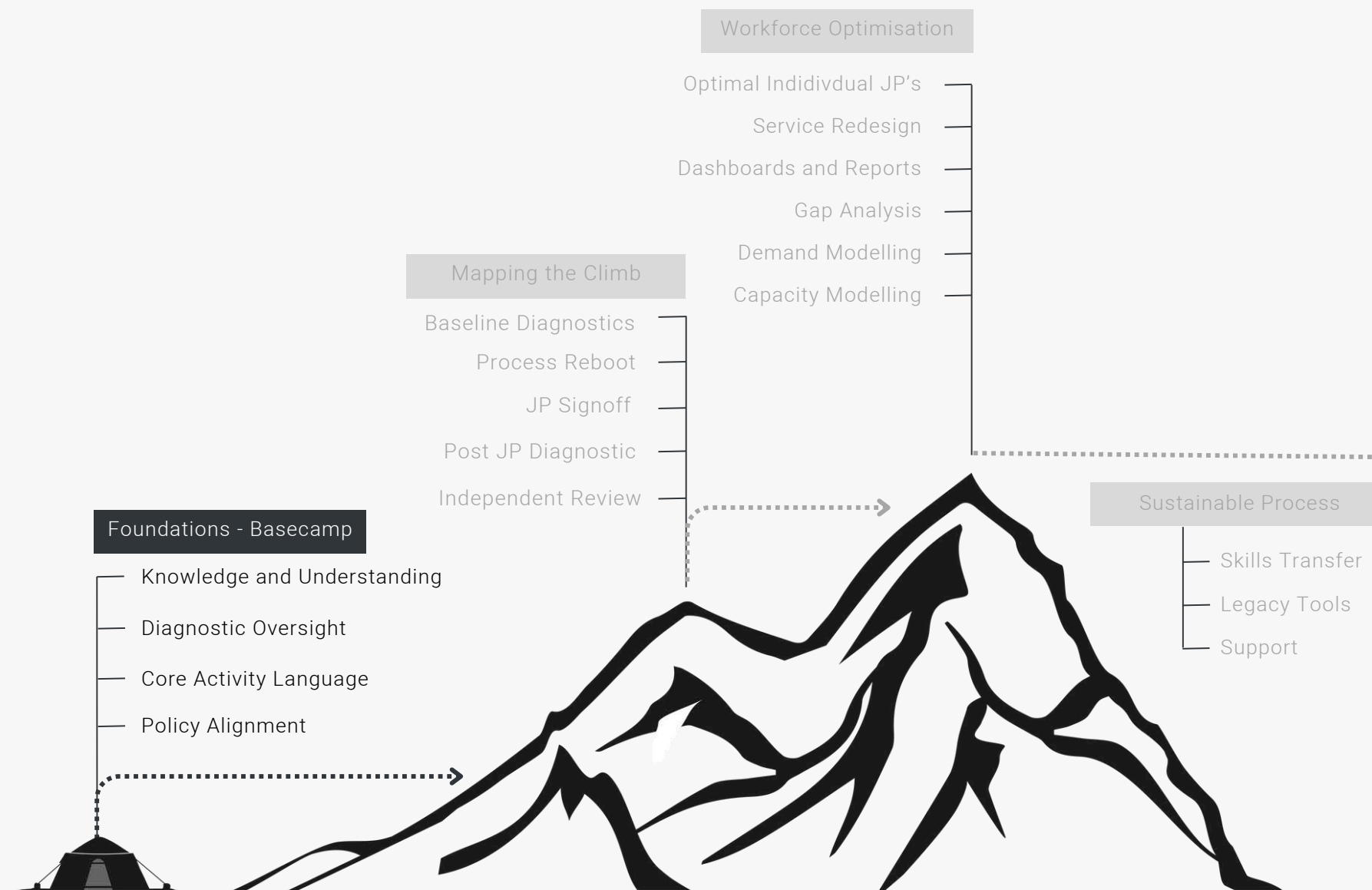
# Three Steps Towards Sustainable Workforce Optimisation





# Basecamp

## Building a Strong Foundation for Success



Workforce planning is complex. That's why SARD Consult starts by ensuring you have the right foundation in place. A strong foundation empowers your trust for long-term success and makes the whole process easier to repeat year after year.

### Our foundation includes:

- Core Activity Language: Clear, shared terms for better communication, analysis, and decision-making.
- Diagnostic Oversight: Data-driven insights to understand your workforce landscape and guide strategic choices.
- Knowledge and Understanding: Equipping your team with essential workforce planning expertise to ensure ongoing success.
- Policy Alignment: Ensuring your plans follow regulations and best practices, safeguarding your trust from potential risks.

These elements create a solid base for your workforce planning, promoting:

- Consistency: Standardised approaches for accurate data and reporting
- Informed Decision-Making: Data-backed strategies for effective solutions.
- Staff Engagement: Building trust through transparency and understanding
- Long-term Sustainability: Empowering your team to repeat and improve the process independently.

Further detailed information regarding the above elements of basecamp are available on pages **16 to 19**.



With a strong foundation in place, it's time to map your climb – understanding exactly where your workforce is now and where you need to be. This assessment is like creating your roadmap for optimisation.

**SARD Consult guides you through:**

**Systems and Data Review:** We examine how you collect, store, and use workforce data to identify areas for efficiency and improvement.

**Engagement Assessment:** We gauge your team's current understanding and involvement to ensure successful adoption of any new processes.

**Goal Alignment:** We ensure your plans support your broader service objectives for a unified and cohesive approach.

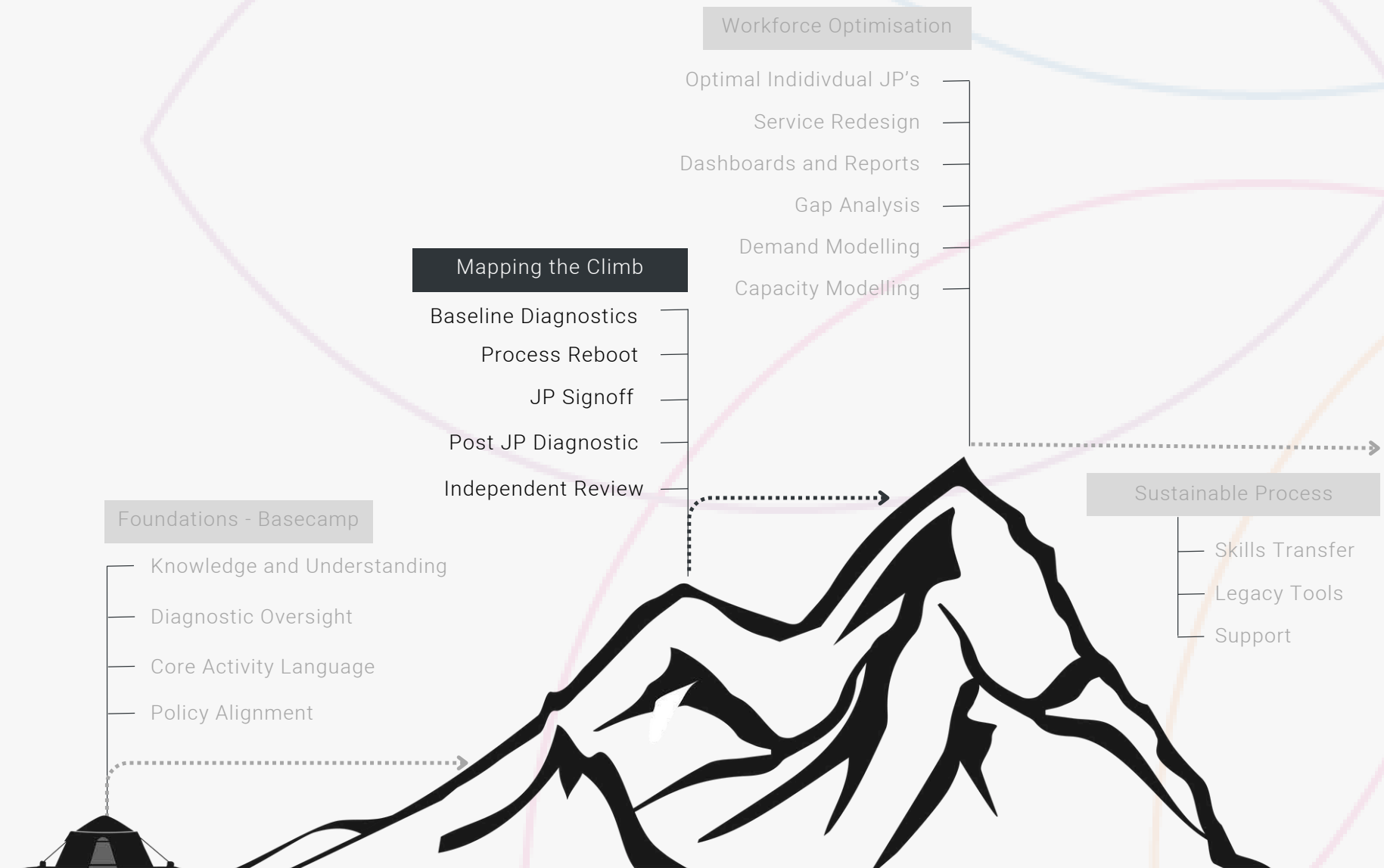
**Why is this important?**

Think of it like planning a mountain climb. You need a map, an understanding of your current fitness level, and clear goals to reach the summit. This assessment gives you all of that for your workforce plans, laying the groundwork for the data-driven optimisation process.

**The Path Forward:** With "Mapping the Climb" complete, you'll have a clear understanding of your starting point, your goals, and the steps needed to bridge the gap. This prepares you for the next stage: workforce optimisation.

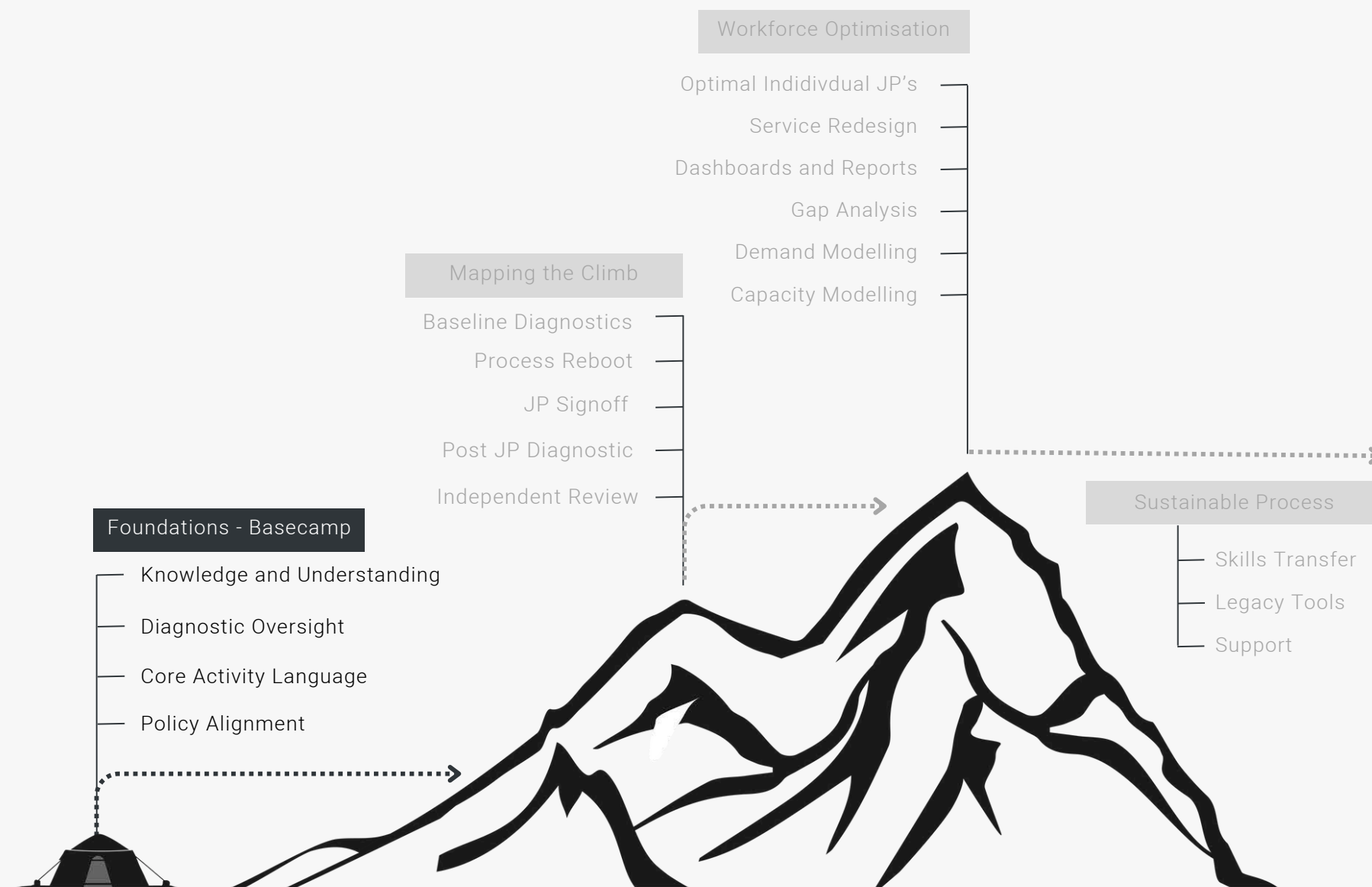
Further detailed information regarding the above elements of mapping the climb are available on pages **20 to 24**.

# Mapping the Climb Assessing Your Workforce Needs



# Workforce Optimisation

## Data-Driven Solutions, Sustainable Results



Many trusts struggle with the time and resources needed to implement effective workforce planning. SARD Consult cuts through the complexity. We deliver tangible results through data analysis, process redesign, and tools that empower your trust for continued success.

### Our Approach

- Capacity Modelling: Uncover your true workforce capacity.
- Demand Modelling: Gain a granular understanding of service demands, patient needs, and workflow patterns.
- Gap Analysis: Identify mismatches between capacity and demand.
- Service Redesign: Data-backed recommendations to optimise job plans, allocate resources efficiently, and address gaps.
- Optimised Job Plans: We help create individualised job plans for doctors that align precisely with service demands.

### The SARD Consult Difference

- Tangible Outputs: We deliver dashboards, reports, and tools to drive actionable insights.
- Accelerated Timeframe: Our expertise helps you achieve optimisation quicker.
- Skills Transfer and Legacy Tools: We empower your team to continue the process independently, ensuring lasting impact.
- Ongoing Support: Tailored support options ensure your continued success in workforce optimisation.

Further detailed information regarding the above elements of workforce optimisation are available on pages **25 to 28**.

# Case Study

## It's All in the Results

### SARD Consult

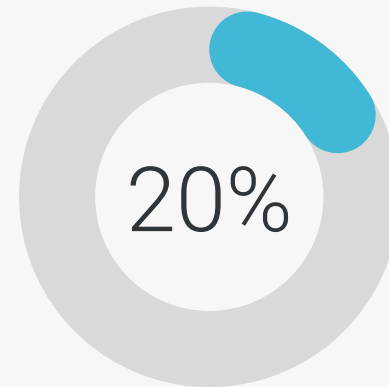
We undertook a trust-wide project to transform workforce planning at Oxleas NHS Foundation Trust, a large mental health trust, and delivered long-lasting results. By deploying our unique approach, we achieved the following headline outcomes:

#### Project Starting Stats:

Trust Job Planning Engagement - **>20%**

Demand and Capacity plans - **0 Services**

Annual Un-codified Activity Spend - **£5 Million**

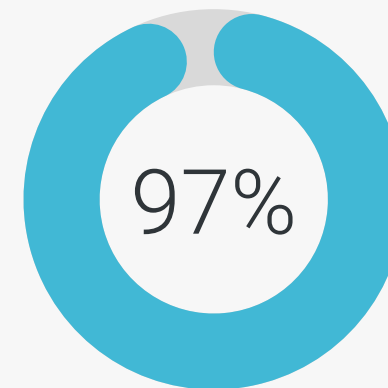


#### Project Completion Stats:

Trust Job Planning Engagement - **97%**

Demand and Capacity plans - **13 Services**

Annual Un-codified Activity Spend - **£0**



Additionally we provided the trust with gap analysis for each team and supported in service redesign where required.

# Our Pricing **Focused on Outcomes**

We take a different approach to pricing. While our day rates are based on the Skills For the Information Age definitions (SFIA), the final cost of your project isn't about a simple calculation. It's about ensuring the value of what you achieve far outweighs your investment.

## **How We Determine Your Price**

We start with a thorough discovery process to understand:

- Where you are now – Your current workforce challenges and data picture.
- Where you want to be – Your desired outcomes for workforce optimisation.
- Your Starting Point – The progress you've already made.
- Your Resource Needs – The level of our expertise and support you require.

Think of our offerings as a toolbox. Our discovery process helps us tailor a solution using only the tools you need, ensuring maximum value. Projects can range from days to months, always focused on your specific needs. We don't believe in one-size-fits-all programs, so every solution is customised to fit your unique requirements.

## **Our Focus on Value**

Our goal is simple: tangible results, not just advice. We become part of your team to help you achieve your workforce goals.

## **Then, we leave you with**

- Achieved Outcomes: The workforce optimisation targets you set are met.
- Sustainable Solutions: Systems and skills to carry this work forward independently.

# Our Pricing

## Return on Investment

All large projects require a clear Return on Investment (ROI) to ensure their viability, especially when public funds are involved. For this project, the Trust will understandably seek assurances that its money is being spent wisely.

Several variables will shape the potential outcomes of this project. We want to outline both the guaranteed results and the potential benefits the Trust can expect upon completing our Workforce Optimisation programme.

We confidently guarantee that an NHS Trust will gain forensic, granular, and meaningful Management Information (MI) that can be used to make strategic decisions around productivity. This information is crucial for many reasons and serves as the foundation for rightsizing resources to meet demand.

Once in place, this Management Information will enable the Trust to achieve some of the following potential outcomes:

- **Cost savings:** through reduced agency/contingency spend, reduced PAs, and optimised recruitment
- **Reduction in backlogs**
- **Safe and sustainable staffing levels**
- **More productive clinics**
- **Improved patient outcomes**
- **Assurances to the wider Integrated Care System (ICS)**
- **Ability to meet NHS England and Department of Health's directives around productivity**

By undertaking this important work, the Trust will ensure it remains ahead of the curve, as productivity is a key component of the NHS's direction, as well as a focus of the new government and the Secretary of State for Health and Social Care.

We understand that NHS Trusts are required to make cost savings. With our forensic level of MI, future decisions will be evidence-based, reducing the likelihood of unintended spending in this area. The goal of our Workforce Optimisation programme is to ensure the Trust is as productive with its resources as possible (considering any limitations) to provide the best possible patient service and care.

# Additional Services

## **Always Developing**

At SARD, we start by listening. We understand that NHS workforce challenges are complex and evolving. While we offer a robust suite of solutions, we're committed to continuously developing new tools tailored to your specific needs.

Before we begin any project, we take the time to deeply understand:

- *Your Goals* – What outcomes are you striving for?
- *Your Barriers* – What's currently preventing you from achieving those goals?
- *Your Values* – What's important to you in a workforce solution?
- *Your Situation* – What are the unique complexities of your service or trust?

### **Our Expertise**

We bring deep experience in workforce management, training, and system development. When we fully grasp your needs, we propose solutions, perhaps beyond our current offerings, to provide you with the best possible path to solving your challenges.

These custom services could include but are not limited to:

- Workforce Planning Dispute Support: Providing independent insights and data-driven recommendations.
- Rostering and Rota Optimisation: Ensuring efficient and equitable shift scheduling.
- Appraisal and Revalidation Support: Streamlining processes with technology and best practices.

### **Transparency and Collaboration**

Any custom development will be charged at our standard day rate. We'll provide a clear proposal and work closely with you throughout the process, ensuring full cost transparency.



# SERVICE BREAKDOWN



WORKFORCE OPTIMISATION

SARD Consult

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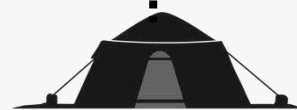


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# Basecamp

## Core Activity Language

Job planning can be a messy process. Without a shared language, it's impossible to accurately understand workforce capacity and match it to service demands. That's why we developed Core Activity Language (CAL), a comprehensive framework designed to bring clarity and consistency to workforce data.

### Core Activity Language: The Benefits

- **Unlock Data-Driven Insights:** CAL enables you to analyse workforce information accurately, revealing gaps and opportunities for optimisation.
- **Make Meaningful Comparisons:** Standardising job planning data allows for benchmarking between teams, services, and even across trusts.
- **Enhance Strategic Decision-Making:** With CAL, you have the reliable information needed to make informed choices about resource allocation and workforce planning.

**Free and Accessible:** We offer our CAL dataset completely free of charge to support NHS trusts and services across the UK.

### Maximising the Power of Core Activity Language: Our Tailored Services

We understand that implementing change takes support. We offer a range of services to ensure CAL works for you:

- **Comparison:** We analyse your current job planning language and map it against CAL, highlighting areas for improvement.
- **Mapping:** Our experts seamlessly translate your existing language into the standardized CAL framework.
- **Inputting:** We help you integrate CAL into your existing job planning system, regardless of the provider.

# Basecamp Diagnostic Oversight

Think of Diagnostic Oversight as a health check for your workforce data. It's the first step to understanding where you stand and where you need to go. We start by ensuring you have a common language (CAL) for consistent data. Then, we dive in:

## Diagnostic Oversight: What You Get

- Capacity Clarity: See your true workforce capacity laid bare – what's in those job plans?
- Activity Analysis: Understand where your staff's time is going. Are activities balanced for optimal service?
- Outlier Detection: We'll flag those odd work patterns that warrant a closer look (and usually explain a problem).
- Budget Insight: See how your money maps to activities, and importantly, where it's disappearing into the "uncoded" black hole.

## Why This Matters

This isn't just about numbers. It's about knowing where to focus your change efforts and having the evidence to back your decisions. Think of it as the 'before' picture in your workforce transformation journey.

## Your Data + Our Expertise = Actionable Insights

We'll need temporary access to your system, no matter how messy the data might seem. Don't worry; we've seen it all! Once we've analysed it, you'll get:

- A clear diagnostic report highlighting key findings.
- Expert guidance on interpreting the data and actionable next steps.

# Basecamp **Knowledge and Understanding**

We've heard it from countless trusts: "Our staff wants to do the right thing, but they just don't know how when it comes to workforce planning." That's where SARD Academy comes in.

## **Bridging the Knowledge Gap**

We believe everyone involved in workforce planning should understand the "why" behind the processes. That's why we offer two foundational courses completely free of charge:

- What Good Looks Like - Job Planning
- What Good Looks Like - Workforce Planning

## **Beyond the Basics: Targeted Training**

Ready to go deeper? We offer specialty-specific courses that address the unique needs of each service, ensuring your staff gets the focused training they need. Our courses are built on practical insights gained from partnering with NHS trusts like yours and designed by experts with over 30 years of hands-on experience in medical workforce management. We don't just teach the theory; we teach what works.

## **Flexible Solutions, Tailored to You**

We know one-size-fits-all training rarely works. Our pricing is flexible, and we can tailor courses to your specific requirements.

## **Discover More at SARD Academy**

Visit [sardjv.co.uk/academy](https://sardjv.co.uk/academy) to explore our growing range of workforce-related courses. Invest in your team's knowledge and watch your workforce planning transform.

# Basecamp **Policy Alignment**

Outdated or misaligned policies are like trying to build a house on sand – your workforce planning efforts will always be shaky. That's where we come in.

## **SARD Consult: Your Partner in Policy Alignment**

We bring clarity and consistency to your policies, ensuring they support your workforce transformation goals. Here's how:

- Policy Review: We'll pinpoint gaps, inconsistencies, and those pesky policies that cause more confusion than help. You'll get clear recommendations for improvement.
- Policy Amendment: We don't just tell you what's wrong – we work with you to refine and update existing policies for better alignment and compliance.
- Policy Creation: Need a policy from scratch? We'll craft it to fit your specific needs and follow best practices your staff will actually understand.

## **Beyond the Policies Themselves**

It's not just about the documents. We can help you:

- Communicate these policies clearly to everyone involved.
- Provide training so staff understand their responsibilities.

## **Why This Matters**

Aligned policies create:

- Consistency: Everyone playing by the same rules.
- Efficiency: Less time wasted on misunderstandings and workarounds.
- Accountability: Clear expectations for staff and management.

# Mapping the Climb

## Baseline Diagnostics

Think of a baseline diagnostic as a comprehensive health check for your workforce capacity data. It's the crucial first step to understanding where you stand and where you need to go. This review digs into:

- *Processes*: How are job plans currently created and managed?
- *Data Quality*: Is your information accurate, reliable, and consistent?
- *Policies*: Are your guidelines clear, up-to-date, and driving the right behaviors?
- *Engagement*: How involved and informed is your staff about job planning?
- *Objectives*: What are your immediate and long-term capacity planning goals?

**Partnering with SARD** - To get the most accurate picture, we need the following:

- *System Access*: Temporary access to your e-job planning system or data extract.
- *Key Documents*: Payroll reports, on-call rotas, and current job planning policy.
- *Key Stakeholders*: Availability of staff involved in job planning for interviews.

### What You Get

- *Actionable Insights*: A clear breakdown of your capacity strengths and weaknesses.
- *Data-Driven Strategy*: Insights for both service-level improvements and trust-wide planning.
- *Targeted Recommendations*: A roadmap outlining next steps, whether you partner with us further or tackle it alone.

### Why This Matters

A strong baseline means no wasted effort. Any changes we suggest, or you implement, will deliver the maximum impact for your specific needs.

# Mapping the Climb

## Process Reboot

Upgrading your workforce processes isn't just about fixing what's broken; it's about building something better for the long haul. That's where our Process Reboot comes in. We work directly with your team to transform how your job planning works.

### **This Phase Includes**

- Core Activity Language (CAL) Integration: One language across your whole trust means clear, comparable data for all.
- Job Plan Overhaul: We'll update existing plans or build new ones using CAL, better policies, and clear objectives, ensuring they reflect the reality of the work.
- Consistency Committee Launch: We'll help you establish this committee to oversee ongoing job planning and ensure it aligns with your goals and objectives
- System 'Reboot': We'll configure your system to work with the new process and data standards, not against them.
- Targeted Training: Empowering your admins and consultants to master the 'new normal' of job planning within your trust.
- System 'Replacement': If your trust decides to move away from your existing system, or if no system currently exists, we can implement our own SARD Medical Job Planning system available within the Digital Marketplace as a seamless part of the process.

### **Why This Matters**

A Process Reboot isn't about a quick fix. It creates:

- Consistent Practices: Everyone operating from the same playbook.
- Reliable Data: Meaningful insights for decision-making.
- Lasting Change: Skills are transferred, and your Consistency Committee ensures your system stays strong.



# Mapping the Climb

## **Job Planning Sign-off**

Engagement throughout the job planning process is key, but the final sign-off is where many trusts hit roadblocks. That's where we can help.

### **Why Sign-Off Matters**

- Not Just Compliance: Signed job plans don't guarantee success. True benefits come when doctors understand the value and feel the plans reflect their real-world work.
- Alignment is Essential: For optimal impact, job plans must align with both service-level and trust-wide objectives.

### **How We Support You**

- Build Buy-In: Our approach fosters engagement throughout the process, increasing the likelihood of easier sign-off.
- Logistical Support: We can manage the administrative burden, ensuring all documentation is completed and submitted.
- Data-Driven Insights: Upon completion, we'll provide detailed reports, analysing compliance, successes, and identifying areas for further improvement.

Our Goal: Simplify the sign-off stage while ensuring your job plans deliver the maximum workforce optimisation benefits.

# Mapping the Climb

## Post Job Plan Diagnostics

Job plan sign-off shouldn't be the end of the story. To truly optimise your workforce, proactively identifying areas for improvement is key. That's where our Post Job Planning Diagnostics service delivers in spades.

While in-depth changes may have to wait, our review, which takes place a few days, weeks, or months after your internal process is completed, provides you with invaluable insights to guide your next planning cycle including:

- Pinpointing Areas for Improvement: We analyse strengths and weaknesses in your current plans, highlighting areas to prioritise for the next round.
- Highlighting Outliers: We can reveal job plans that stand out, prompting further review.
- Objectives Alignment: We compare job plans to both service and trust-wide objectives to ensure a good fit.
- Ensuring Data Readiness: We'll identify what data you'll need to collect during the year to create even better, more impactful job plans next time.
- Optimising Resource Use: Even without mid-year plan changes, we uncover ways to better utilise your existing team within the current framework.

### Why This Matters

- Streamline Future Planning: Start the next cycle with a clear roadmap fuelled by lessons learned, saving time and effort.
- Make Evidence-Based Decisions: Our analysis provides the data you need to justify resource requests for the next planning cycle.
- Improve Trust-Wide Alignment: Ensure workforce efforts are fully supporting your trust's priorities.

This service as with others can be standalone, designed to support any trust seeking to build a sustainable, continuously improving workforce planning process.

# Mapping the Climb

## **Independent Reviews**

Sometimes, knowing where to start with workforce optimisation feels overwhelming. That's where an independent review helps.

We understand that when workforce planning processes aren't working, it can be hard to pinpoint the root cause of the problem or to back up perceived problems with evidence and data. Is it the system, the policies, or something else entirely? Competing views can make it even harder to find clarity.

Our team brings deep experience diagnosing workforce planning challenges across various NHS settings. We offer a fresh perspective, a system-agnostic approach, and a thorough assessment focused on:

- **System Functionality**
- **Data Quality**
- **Policies and Alignment**
- **Communication and Data Use**

Our goal is to help you pinpoint the blockers - whatever they may be - and provide clear actions to overcome them. This assessment provides the roadmap for a workforce planning process that delivers reliable insights and helps you regain trust in your workforce data. Imagine having the clarity to finally make those evidence-based staffing decisions that improve patient care.

Rest assured, this is not a backdoor to system sales. We're solely committed to providing an independent review to help you make the most informed decision possible to move the trust forward.

# Workforce Optimisation

## **Demand and Capacity Modelling**

At its core, workforce planning comes down to a simple question: Do you have the right people in the right places to meet patient demand? Sounds easy, but the NHS knows it's not.

### **Challenges With Traditional Approaches**

Many trusts rely on individual job plans or 'guesstimates' to define their capacity. While valuable, these often lack the hard data needed to justify changes. They also often leave out schedules, including clinics, theatre slots and administrative burdens. Equally demand data is often disparate in nature and hard to find. This data exists somewhere, but it's often scattered, confusing, and hard to use. It can make you feel like you're flying blind.

### **The SARD Solution**

We're experts in finding and translating this data into clear insights. Working alongside key stakeholders, we build forensic level custom demand and capacity models using our powerful tools, revealing:

- What you have compared to what you need. Dashboards and GAP Analysis
- Where you can improve efficiency with the team you have. Service Redesign
- Strategic areas for future hiring to maximise patient impact.

### **Why This Matters**

These models give you solid evidence to:

- Justify resource requests with confidence.
- Make better use of the staff you have.
- Strategically target future hiring to truly address patient needs.

# Workforce Optimisation

## Gap Analysis, Dashboards and Service Redesign

Gap analyses often rely on surface-level data, or focus narrowly on specific jobs. This can lead to costly surprises, which in turn can create reactive cycles of understaffing or overspending, directly impacting patient care.

Expertly interpreting the data is key to breaking this cycle.

### The SARD Solution

We dive deeper, combining insights from your demand and capacity models with forensic data on:

- Staff Utilisation: Are resources matched to tasks, or misaligned?
- Service Patterns: Where are the bottlenecks, and can workflows be smoothed out?
- Potential Efficiencies: Could redistributing tasks free up staff for priority areas?

### This isn't just about identifying the gaps. We provide

- Clear Dashboards and Reports: We present clear and readable data, identifying detailed misalignments, both under and over subscribed areas such as clinic or theatres. Empowering you to be able to make strategic decisions.
- Service Redesign Recommendations: We collaborate with you to optimise your workforce, maximising the impact of your existing team.

### Why This Matters

- Proactive Planning: Gap analysis lets you address issues before they become crises.
- Evidence-Based Decisions: Move beyond guesswork to make data-driven choices about staffing and resource allocation.
- Sustainable Optimisation: Identify opportunities for long-term improvement and lasting resource efficiency

# Workforce Optimisation

## Optimal Individual Job Plans

We understand job planning is a necessary and complex process, balancing individual contractual requirements with the broader goals of the service. That's why our optimal job plan templates offer a powerful tool to streamline this process, while ensuring clinician expertise is fully valued.

### How It Works

- **Data-Driven Insights:** Leveraging insights from the Workforce Optimisation process and clear activity data from the Core Activity Language, we create templates that factor in backlogs, referral patterns, and realistic time allocations for various tasks.
- **Tailored Starting Point:** These templates provide a data-informed framework for clinicians to customise, ensuring their unique preferences are respected.
- **Impact Analysis:** If a clinician modifies their template, our tools allow you to assess the service-wide impact of those changes, maintaining a clear picture of your workforce capacity.

### Why This Matters

- **Streamline Job Planning:** Reduce guesswork and lengthy negotiations, freeing up time for patient care.
- **Optimise Resources:** Templates help identify potential over- or under-utilisation of clinician skills.
- **Evidence-Based Collaboration:** Data-backed templates foster a shared understanding of service needs between clinicians and managers.

# Sustainable Process

## **Skills Transfer, Legacy Tools and Support**

We understand that relying on external consultants year after year isn't sustainable financially or for building internal expertise. However, Workforce Optimisation isn't a one-time fix. To truly meet evolving patient demands, there needs to be an ongoing process to ensure standards are maintained. As such, a focus on long-term sustainability is a core function of the services we offer.

### **The SARD Approach**

Our focus is on empowering your team for long-term workforce planning success. We offer:

- Skills Transfer: We don't just do the work, we teach you how. Alongside every service, we embed knowledge transfer, ensuring your staff gain the skills for independent planning.
- Legacy Tools: Our powerful tools are essential for effective workforce optimisation. After the initial implementation, we offer them at a significantly reduced cost, along with the training to use them effectively.
- Ongoing Support: We don't disappear. We provide a level of annual support tailored to your needs – answering questions, offering guidance, and ensuring your tools are always working for you.

### **Why It Matters**

- Cost-Effective Optimisation: Avoid the expense of repeatedly outsourcing this critical process.
- Build Internal Expertise: Empower your team to become workforce planning experts.
- Long-Term Sustainability: Ensure your service can adapt to changing needs, independently and confidently.



# Engaging with Us

## The Process

We know embarking on a workforce optimisation project can feel daunting. Our goal is to make the process smooth and collaborative, with a clear roadmap from start to finish.

### Our Approach

1. *Deep Discovery* – Before recommending any services, we undertake a thorough discovery process to understand your unique needs, goals, desired outcomes, and current situation.
2. *Transparent Proposals* – We'll develop a tailored program and proposal outlining the specific services, costs, and expected timelines.
3. *Project Management* – A dedicated SARD project manager will provide regular updates, facilitate communication, and help address any obstacles. This ensures accountability and keeps the project on track.
4. *Team Expertise* – We'll match the right expertise to your needs. Our Systems team handles implementation, workforce experts lead planning, etc. This ensures you're always working with the right specialist at the right time.
5. *Sales Support* – Our sales team oversees proposals, contracts, and finances, providing a single point of contact for any administrative or budgeting concerns.
6. *Bespoke Pricing* – We offer bespoke pricing that is tailored to each organisation. SARD Workforce Optimisation proposal will be sent over after we've truly understood your trust's needs during our detailed discovery meeting.

### Why This Matters

- *Clarity and Confidence* – You'll have a clear understanding of the process, timelines, and who's responsible for what.
- *Collaboration* – We work with you, not just for you, ensuring your team feels empowered throughout.
- *Results-Focused* – Our streamlined approach ensures a successful outcome that truly solves your workforce challenges.

To get started, visit [www.sardjv.co.uk](http://www.sardjv.co.uk) or email [discovery@sardjv.co.uk](mailto:discovery@sardjv.co.uk).




# SARD

**Would you like to discover more? Get in touch:**

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