SARD
CONSULT

Improving Workforce Planning

Our Comprehensive Approach to Improving Workforce Planning

Supporting the NHS to Deliver More with the Workforce It Already Has

The NHS continues to work in a challenging environment. National priorities are evolving, with a clear focus on eliminating long waits, prioritising the productivity of the workforce, and creating sustainable services that can meet ambitious delivery targets. Achieving this requires more than short-term fixes. It needs a deep understanding of each organisation's unique challenges and opportunities.

Every Trust is different. Before recommending any intervention, SARD takes the time to understand your specific context: your workforce, your data, your priorities, and the pressures on your services. Through structured conversations and detailed analysis, we build a clear picture of what's working well, and not so well, and also what needs to change to release capacity in an clinically safe and sustainable way.

Once that understanding is in place, we can offer a range of tailored programmes designed to deliver meaningful results. These can take the form of smaller, targeted improvement work at Trust or specialty level, or a full demand-led transformation of workforce planning. We also offer bespoke programmes shaped around your organisation's unique circumstances.

Our approach builds on what you already do well. We focus on creating clarity, reducing anomalies, and supporting meaningful engagement across all specialties. Whether delivered as a full programme or in smaller stages, each element is aimed at delivering practical value to your organisation, your workforce, and the patients you serve.

Our Programmes | Policy Development | Diagnostic Assessment
Core Activity Language | Training and Engagement | Workforce Optimisation Programme
Anaesthetics Productivity Assurance | Our Approach

Our
Programmes

with any NHS Trust, we start every engagement with an open-mind and a focus on understanding your unique situation and needs. Once we have that understanding, we can recommend the most appropriate way forward from a number of tailored programmes, which can be delivered individually or in combination to achieve results at pace.

Our main programmes are:

Job Planning Improvement Programme

- Policy Development

- Diagnostic Assessments (Quality Assurance)

- Core Activity Language

- Training and Engagement

- Systems and Improvements

Workforce Optimisation Programme

- Demand-Led Planning

- Transparent Workforce Analysis

- Actionable Financial Insight

- Sustainable Planning Framework

- Repeatable Annual Process

Bespoke Improvement Programme

- Anaesthetics Productivity

- Wider Productivity Improvements

- Comprehensive Rota Reviews

- WLI Reduction Support

- Targeted Service Redesign

A clear, well-structured job planning policy is essential for ensuring consistency, compliance, and engagement. If your Trust already has a policy in place, we can review it to assess whether it remains fit for purpose or requires refinement. Alternatively, we can work with the Trust to develop a new policy that suits your organisational needs and priorities. We ensure the governance framework supporting job planning is robust, practical, and aligned with both NHS standards and the Trust's operational requirements.

We work with Trusts to develop, refine, or enhance job planning policies so they are actionable and effective. Where changes are required, we ensure the policy clearly outlines roles, responsibilities, and processes, while integrating with other key workforce planning functions.

Why This Matters for Your Trust?

A well-defined job planning policy ensures clear expectations, strong governance, and effective workforce planning. If the existing policy is sufficient, this review will provide confidence in its effectiveness. If changes are needed, the revised policy will ensure job planning becomes a valuable tool for effective workforce planning rather than an administrative burden.

Key Components of the Policy Development

- *Comprehensive Policy Review:* Assessing the Trusts current job planning policy (if applicable) to determine its effectiveness.

- *Alignment with NHS Requirements:* Ensuring compliance with national job planning guidance and Trust-wide workforce objectives.

- *Governance and Accountability Structure:* Clarifying roles, responsibilities, and oversight for job planning.

- *Integration with Workforce Processes* – Ensuring alignment between job planning, rostering, and wider workforce management.

- *Engagement and Communication Strategy:* Recommendations on how to drive staff engagement and ensure the policy is well-understood and followed.

Policy Development

Diagnostic Assessment

Effective job planning starts with a clear and accurate understanding of where you are now. Our Diagnostic Assessment provides a quality assurance review of your existing job planning data, language, and system configuration to identify strengths, gaps, and areas for improvement.

We work seamlessly with any job planning system. Using secure data extraction, our experts analyse data quality, engagement levels, activity language, and configuration. The outputs include a series of clear, visual reports that highlight opportunities to strengthen governance, improve data quality, and increase workforce insight, all while maintaining full data integrity and confidentiality throughout the process.

Why This Matters for Your Trust?

This data-driven diagnostic serves as the foundation for job planning improvements. It allows the Trust to pinpoint where interventions are needed and ensure that every subsequent improvement is targeted and effective. By addressing data inconsistencies, system limitations, and engagement barriers upfront, your Trust can move towards a more structured, meaningful, and impactful job planning process.

Key Components of the Diagnostic Process

- *Quality Assurance Review:* Providing an expert assessment of your existing job planning setup, data integrity, and system configuration to ensure accuracy, consistency, and reliability.

- *Departmental Productivity Review (RAG Assessment):* Assessing job plan engagement levels, highlighting high-risk areas, and producing a Red, Amber, Green (RAG) report to identify where action is needed.

- *Activity Identification:* Detecting uncategorised activities or inconsistent data entry that impact job planning accuracy.

- *Anomaly Detection and Data Validation:* Identifying errors in on-call arrangements, DCC/SPA splits, and workforce allocation, highlighting potential over/underutilisation of resources.

- *Core Activity Language Review:* Providing insights into the activity terminology used across departments and individuals, with recommendations for improvement.

Core Activity Language

Clarity and consistency are essential for effective job planning. By using standardised activity language, Trusts can ensure accurate reporting, reduce duplication, and build confidence in their job planning data.

We specialise in standardising job planning data to improve clarity, accuracy, and usability. If your Trust already has job planning data in place, we can conduct a detailed review of how activities are currently categorised and structured against our industry leading core language set, ensuring that all job plans contain clear and consistent activity descriptions across each specialty or department. If not, we can provide our core activity language, tailored to your organisation's specific needs and requirements to ensure consistency moving forward.

Why This Matters for Your Trust?

Clear, standardised job planning language will enable you to improve reporting accuracy, workforce planning, and overall job planning efficiency. By removing inconsistencies and ensuring all job plans use a structured, meaningful set of activity descriptions, the Trust will be able to make better-informed workforce decisions. Standardisation also makes it easier for clinicians to complete job plans, reducing ambiguity and enhancing engagement with the process.

Key Components of the Core Activity Language

- *Core Activity Language Mapping and Review:* Assessing how your Trusts existing activity descriptions compare to our Core Language and best practice.

- *Inconsistency and Duplication Identification:* Identifying and resolving outdated, duplicated, or unclear terms that reduce reporting accuracy

- *Activity Categorisation and Standardisation:* Ensuring job plans use consistent, well-defined categories for clinical, non-clinical, and supporting activities.

- *Data Cleansing and Structural Improvements:* Helping to remove redundant, unclear, or duplicated entries that impact planning, understanding and insights.

Training is most effective when it supports and reinforces a wider job planning improvement programme. However, our training offer is extremely flexible, and we can provide job planning training for your workforce covering all aspects of workforce planning, regardless of which systems you currently use.

Through SARD Academy, we offer a structured, role-specific training model that can be tailored to suit different audiences across the Trust. Whether delivered online or in person, each session is designed to increase understanding, build confidence, and encourage meaningful engagement with job planning.

Why This Matters for Your Trust?

Meaningful engagement with job planning that delivers useful outputs can't simply be mandated. It must be earned through clarity, confidence, and relevance. By offering targeted training that meets users where they are, ideally following the restructuring of processes and systems to support the best possible data outcomes, your Trust can embed best practices across the organisation. This will improve compliance, data quality, and the overall value that job planning delivers.

Training and Engagement Delivery Programme for Trusts

- *Consultant Group Sessions:* These sessions outline the purpose and value of job planning, what's expected of consultants, and how their input supports broader workforce planning. Moving job planning from a tick-box task to something that protects clinical time and supports service delivery.

- *Service Lead Training:* Supporting service leads to interpret data, manage and improve engagement, and understand 'what good looks like'. Sessions are designed to deliver real insights in managing the job planning process to give leads the confidence, understanding and skills to drive improvement and consistency.

- *Executive-Level Sessions:* Strategic training for senior leaders on how job planning supports long-term workforce planning. We provide insight needed to turn job planning data into actionable information that supports decision-making, resource allocation, and long-term planning across the Trust

- *Bespoke Sessions:* Tailored support for individuals or departments, including one-two-one, attending at Trust-led events, or drop-in sessions covering all specialties.

Training and Engagement

Workforce Optimisation

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SARD Consult Workforce Optimisation is a fundamentally different and more comprehensive approach to workforce planning. Rather than beginning with consultant job planning, we start with the demand on your services, using our dedicated SARD Consult demand modelling system to establish a robust baseline for the services your Trust delivers. This allows consultant capacity via job planing, to be assessed and quantified directly against real service need.

Our Demand-Led Approach

Demand Modelling as the Foundation

We work with your teams to build detailed demand models across all specialties, expressed in Programmed Activities (PAs). This covers not just clinical work, but also all non-clinical activities such as teaching, research, and leadership roles to create a complete picture. Our team does the "heavy lifting" on this complex process, taking your raw data and converting it into a clear, strategic model.

Team-Based Job Planning at the Right Stage

Once demand is modelled and agreed internally, we work with the clinical team to explain the total demand on the service and help facilitate a team-based approach to distribute the work fairly among the available consultants. We then re-introduce, re-implement and re-integrate your chosen Job Planning System to ensure that individual job plans are captured accurately, consistently, and are fully agreed and signed off.

Integration with the SARD Consult Demand Mapping System

The SARD Consult system acts as a central platform for structuring, analysing, and reporting demand data and outlining the required amount of capacity to meet it. It provides transparency, a clear audit trail, and the ability to revisit and refresh the analysis annually.

Full Integration and Actionable Outputs

Demand and job planning data are combined to give a precise view of where consultant capacity meets, exceeds, or falls short of service need. We provide clear, evidence-based reports that show workforce gaps and can be used to model scenarios for recruitment or restructuring.

Strategic and In-Person Support for Leadership

This is more than a data analysis exercise; it is a strategic partnership. Our experts will provide in-person support, meeting with key stakeholders to provide the consultancy and advice needed to think about how you might remodel services, plan recruitment or realise identified savings. This includes offering guidance on aligning clinical models with best practice standards, such as remodelling an emergency department based on patient flow or designing a new acute medical unit.

Workforce Optimisation

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What Does This Give Your Trust?

- A **complete, evidence-based picture** of demand and capacity, expressed in a common framework that provides clarity and confidence in decision-making.

- **Clear identification of oversupply and undersupply**, showing where savings can be realised and where recruitment or service redesign is required.

- A **transparent and equitable process** for dividing demand fairly across all consultants within each department, supporting engagement, improving utilisation and increasing productivity.

- **Clarity that builds confidence**, strengthening your case in internal discussions, external negotiations, and national forums.

- **Evidence to support recruitment business cases, workforce planning, and service redesign decisions**, grounded in data rather than anecdote.

- **Actionable financial insight** as demonstrated in our work with UK Trusts. This process can identify efficiencies (such as the recently identified saving of over £1.2m in a single department) while also providing the robust evidence needed to secure investment where services are under-resourced.

- **Reports and models that can be replicated annually**, embedding workforce planning into the Trusts normal planning cycle and reducing reliance on external support in future years.

- **Confidence for leadership teams** that decisions are based on transparent, consistent, and sustainable evidence.

Why Does This Matter?

Medical job planning can provide valuable data about your available planned capacity. However, unless this is compared against the demand on services, it simply adds to a patchwork of information that must be managed internally by the organisation.

Our Workforce Optimisation Programme delivers the answers, not the questions. It begins with your demand, structures it within a repeatable and transparent system, introduces job planning at the right stage as part of that structure, and integrates both datasets to reveal the true relationship between workforce and service delivery. It also provides expert analysis and recommendations to rightsize your workforce effectively.

This approach equips Trust leadership with the evidence needed to understand the workforce, plan recruitment, manage resources, and redesign services where required, with confidence. It also provides a sustainable framework that your own teams can repeat year after year, ensuring the benefits are not a one-off but an enduring capability.

Anaesthetics Productivity Assurance

Our Anaesthetics Productivity Assurance Programme gives Trusts the evidence needed to demonstrate compliance with NHS England's 98% delivery expectation, while ensuring job-planned capacity is fully aligned to patient need and elective recovery targets.

Anaesthetics as a speciality offers a unique opportunity to undertake this analysis effectively, as electronic rostering systems are already embedded in most departments.

By analysing job-planned activity alongside rostered and delivered activity, our programme and tools can evidence exactly where capacity is being utilised, where shortfalls exist, and where there may be surplus capacity that could be redirected to meet service need or converted into financial savings through budget reallocation.

Why This Matters for Your Trust?

When planned and delivered capacity do not align, Trusts risk losing significant clinical and financial value. In one anaesthetics department we analysed, only 86% of job-planned DCC capacity was being delivered, equivalent to over 52 PAs of underutilised capacity each week. This gap represented paid clinical time that could have been used to reduce waiting lists, support additional sessions, strengthen service resilience, or release funding for other priorities.

Key Components of Anaesthetics Productivity Assurance

- *Capacity vs Delivery Analysis:* Comparison of job-planned activity against rostered and delivered sessions, benchmarked against the NHS England 98% target.

- *Variation Identification:* Transparent evidence and heat maps highlighting where variation exists between individuals, teams, or days of the week, and why.

- *Financial Impact Assessment:* Quantification of underutilised capacity and associated financial implications, including potential savings or reinvestment opportunities.

- *Recommendations for Improvement:* Practical steps to improve utilisation, which may include job plan realignment, rota redesign, or targeted redistribution of activity.

- *Implementation Support (Optional):* Hands-on support to help the Trust close identified gaps, embed sustainable improvements, and deliver tangible service benefits. This ensures ongoing compliance and provides a structured framework for realising future opportunities.

Our Phased Approach To Working With You

Discovery and Understanding

In the opening phase, we work closely with your teams to build a clear understanding of current processes, identifying the operational and workforce challenges that impact efficiency and performance. Together, we pinpoint areas for immediate improvement and agree on realistic goals for both short-term progress and long-term sustainability.

Implementation and Support

This stage focuses on strengthening the foundations for improvement. Depending on the programme, this may include refining processes, embedding governance and systems, updating policy, or supporting cultural change. Our team works with key stakeholders to deliver agreed actions and ensure sustainable outcomes.

Review and Handover

We bring the programme together by sharing the outcomes of our work, presenting clear priorities for the short, medium and long term. A detailed improvement plan is handed over to your internal teams, ensuring ownership of the process and the ability to maintain and build upon the progress achieved.

Our Approach

Engaging With Us

Looking to **Improve** Your Existing Job Planning Processes?

- Diagnostic Assessment
- Policy Development
- Core Activity Language
- Training and Engagement

Looking to **Transform** Your Existing Job Planning Processes?

- Workforce Optimisation
- Anaesthetics Productivity Assurance
- Demand-led planning
- Detailed capacity analysis
- Team-based job planning
- Actionable financial insight
- Evidence-based service redesign
- Repeatable, sustainable framework

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