



## Case Study: Whole Systems Rapid Improvement for Stockport Orthotic Services

**Key Ideas:** Whole Systems, Rapid Improvement Events, Health Sector, NHS, Orthotics, Podiatry, Productivity Improvement, Cost Savings, Service Design, Tricordant Approach.

### Background

Stockport Primary Care Trust works with the local community and health partners to deliver health services that are responsive to the needs of local people. The PCT is responsible for: improving the health of Stockport people; commissioning hospital services, and developing primary care and community service.

In June 2007 Tricordant Ltd was asked by Stockport PCT to conduct a Whole Systems Rapid Improvement Event (WSRIE) for their Orthotic Services *to improve further the patient service provided, and productivity achieved, across the Orthotic services in Stockport.* The project was to be done in partnership with Stockport NHS Foundation Trust which had a separate acute orthotic service within Stepping Hill Hospital in Stockport.

The original pre-project idea, following a national 'Pathfinder Project' report in July 2004, was to consider if all orthotic services should be taken on by the PCT and run centrally from the PCT facilities at 'Kingsgate' in the city centre, occupying fully the new facilities built there, and with a reduced on-site presence at Stepping Hill Hospital run as a service from the PCT. Also the Podiatry workshop, a small technical workshop run by the PCT making insoles for the podiatry department, needed to be moved from the Cherry Tree site, as this was closing and, if it was seen as sustainable and cost-effective, move it to Kingsgate or to a local light industrial unit. If not the podiatry orthoses might be increasingly bought-out from external suppliers.

These pre-supposed outcomes did not turn out as the best way forward. The project workshops and application of Tricordant's whole system organisation design tools revealed the need for a more detailed and subtle approach. However there emerged other possible significant improvements and savings to be made. This case study aims to summarise the approach taken, the main findings and the outcomes of this project.

### Approach

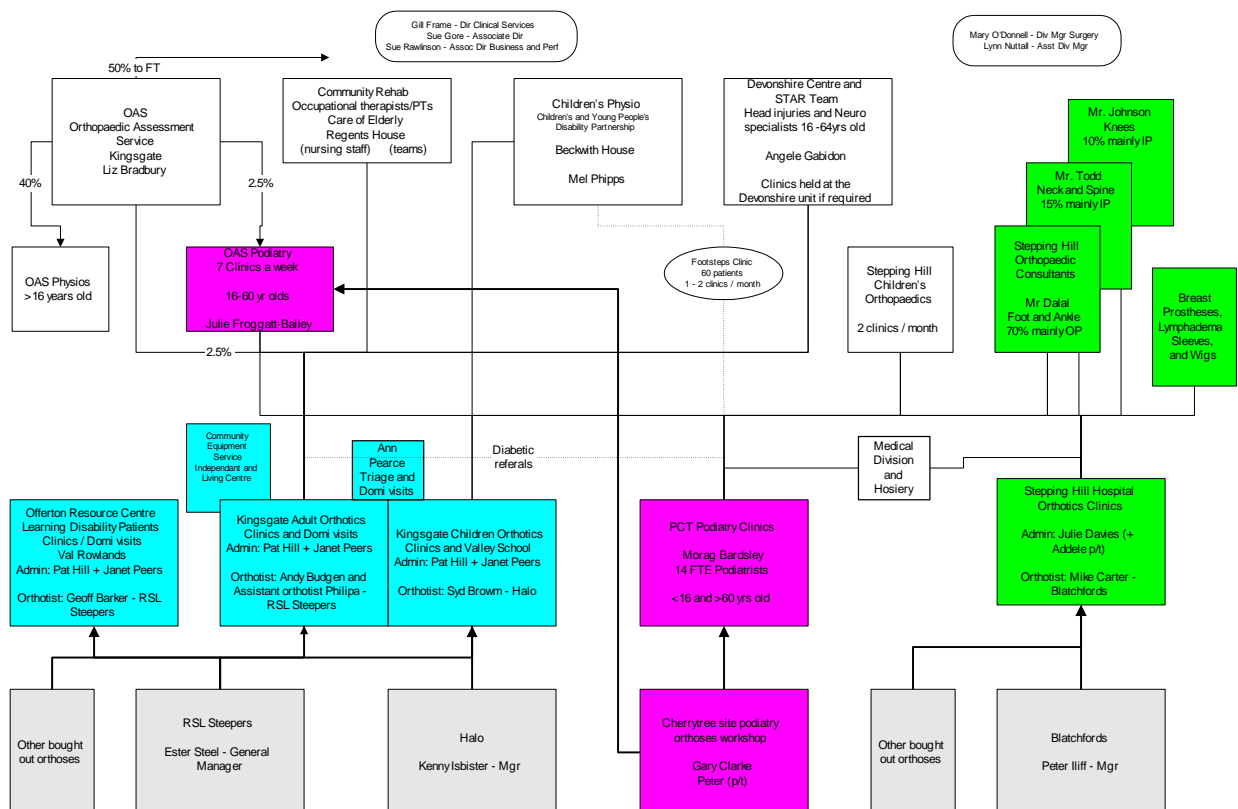
Tricordant is a 'whole systems' organisation development consultancy. We work with [complex organisations within Health, Industry, Government and the Service Sector](#). Tricordant has developed an approach to 'Whole Systems Rapid Improvement Events' which enables local stakeholders to work together around a particular complex service or key issue and to agree joint improvement actions. Timescales are kept short and a sense of urgency and energy is deliberately created. The approach combines expert group facilitation, whole systems analysis and the application of lean principles where appropriate.

For the Stockport Orthotics Project the following main activities were carried out:

- Planning meeting
- Interview of system representatives – 23 people, including orthotic service managers and administrators within the PCT and the separate Acute Trust service, orthotists working for commercial orthotic supply companies, podiatrists, the podiatry technician, referring physios, and orthopaedic surgeons

- Identification of the system boundaries, gathering of base data, preparation of a whole system map
- Rapid Improvement Workshop 1: with representatives from across the whole system, the building of the team, understanding the whole system, analysing the effectiveness of the current system, agreeing the best structure for the service going forward, and the creation of a strategic improvement action plan
- Rapid Improvement Workshop 2: with managers of the key service areas, reviewing and confirming the whole system organisation design for the future, progressing the actions required, taking decisions on implementation and starting to cost the benefits.
- Supporting the team to document and justify required actions
- Post-event review

## Overview map of Orthotic Services in Stockport





## Rapid Improvement Event Workshops

Two rapid improvement event workshops were held in which representatives from the whole system were brought into a room and facilitated to develop an intelligent, holistic solution for orthotic services and to get things actions underway quickly.

### Workshop 1

The first workshop involved 16 representatives from across the whole service including managers and orthotists from external supply companies. The workshop started with people getting to know each other better through a 'speed dating' game. Delegates were taken through the Orthotic Service Map (above), together with information and statistical data gathered on each part, all based on information provided during the interview phase. Delegates were encouraged to edit the map to ensure accuracy and gain ownership.

A brief introduction to whole systems organisation design principles was then given and a number of whole system tools described. The delegates were asked to draw up a Tricord™ (see [www.tricordant.com/conc03.htm](http://www.tricordant.com/conc03.htm)) for the service and to identify current systemic problems under the headings Identity, Strategy, Systems and Culture. Based on this analysis, and the application of the design principles, the delegates were facilitated through developing a vision of the best structure for service. In the afternoon delegates worked in small groups to develop lists of recommended actions, and then all together, prioritised them and created a timed and allocated action plan with some 'quick hits' benefits to take.

### Workshop 2

A month later a smaller group of managers in charge of the different service areas met during a second workshop to review and confirm the proposed structure going forward, to consolidate the recommendations and agree implementation actions. Out of this came a joint final report and plan.

## Summary of Recommended Actions

The need for eight key actions were identified:

1. Consolidate a three 'whole work unit' structure
2. Implement a 'Stockport Orthotics Steering Group'
3. Review relationships with, and supplies from, the Orthotics companies
4. Focus on exclusively consultant-supporting work at Stepping Hill
5. Maximise the cost benefits from having the low cost in-house podiatry workshop
6. Clarify patient pathways across the PCT area
7. Ensure the 18 week target can be met
8. Collate and quantify all potential cost savings and sort out budgets

## The Proposed 'Whole Work Unit' Structure

The debate at the workshops and the application of Tricordant's whole system organisation design principals showed that the simple consolidation of all orthotic services under the PCT at Kingsgate was an over-simplistic solution. There were in fact 3 distinct 'whole work units' each with their own separate purposes, identities, processes, referral paths and rhythms (see blue, pink and green boxes on the diagram above). What was needed was the consolidation of a 'whole work unit' structure with clarified roles and simplified boundaries. This would provide clearer pathways for patients to be



directed to the right service by the Orthopaedic Administration Service, GPs and the specialist clinical referring units.

## Benefits

The following cost benefits are in the process of being analysed and scaled.

Cost savings:

1. Diversion to Kingsgate Orthotic clinic of those referrals to Orthopaedic Consultants who do not need surgery or acute care at Stepping Hill.
2. Sourcing of made-in Podiatry Workshop insoles by orthotics (the made-in podiatry insoles were carefully costed and found to be well under half the price of equivalent bought-out products!)
3. Sale of Podiatry Workshop insoles to other PCTs in the Manchester area generating income
4. Purchasing of other orthoses through the Manchester-wide single-sourcing contract with RSL Steepers
5. For diabetic patents and for <16 year old patents - more efficient patient pathways with less steps possible and for
6. Otherwise more efficient/clearer pathways between OAS /orthotics and podiatry maximising efficient use of their different expertise and capacity
7. Plus overall benefit of having an integrated 'whole system' service with a mechanism for ongoing learning and continuous improvement, targeting say a further 3% annual improvement.

After the project Gillian Frame, Director of Provider Services, Stockport PCT, said: *"Tricordant's approach gave the PCT a way to make a rapid difference to the two services we targeted, 'Orthotics' and 'Contraceptive and Sexual Health'. Within weeks the people from across each service network had come together better as a team, understood the complexity of the bigger picture, developed their vision and reviewed their strategy and structure. Action plans were quickly in place, cost savings identified and the teams were starting to implement the necessary change. It's an approach that picks up an area, pulls it together and gets the energy flowing again."*

## Project Outputs

By the end of this phase of the project the following has been enabled:

- The Orthotics Service across Stockport better seeing themselves as part of a 'whole system'
- Challenging of the historical boundaries with people already working across boundaries to improve the whole
  - Across professional boundaries i.e. between Orthotics and Podiatry
  - Across NHS organisational boundaries i.e. between PCT and Acute Hospital Trust
  - Across external organisational boundaries i.e. between Orthotic Company and the NHS
- Development of an agreed vision for the ongoing organisational structure of the service
- Creation of an action plan for the improvement of the service
- Identification of the potential cost benefits and where possible these being started to be quantified.



If you would like to learn more about this case study or would like Tricordant to help your organisation please contact: Simon Thane, Director, Tricordant Ltd, [simon@tricordant.com](mailto:simon@tricordant.com), Tel: 07989 112062.