

Value Management in mental health care settings

February 2023

We asked staff from NHS Highland and NHS Forth Valley to reflect on their experiences implementing the Value Management approach in mental health care settings and to share their insights into what it has enabled them to achieve. Could this work for you? This report considers:

- Key features of the way Value Management was implemented
- The difference Value Management had made

Can a Value Management approach bring benefits in mental health care settings?

Successful implementation of a Value Management approach has been demonstrated in acute general hospital settings. This collaborative has shown it can also support teams in making improvements in mental health settings including during the COVID-19 pandemic.

We share here details of the approach taken by NHS Forth Valley and NHS Highland and how it made a difference. (See also [Easter Ross case study](#).)

Could Value Management work for you?

By giving insight into how the approach enables change and delivers impact, drawing directly from practical experience, we hope to help others delivering mental health care services decide if they could benefit from introducing a Value Management approach.



This team is one of a number across Scotland who are taking part in a collaborative led by [Healthcare Improvement Scotland](#), working in partnership with [NHS Education for Scotland](#) and the [Institute for Healthcare Improvement](#).

To read more about the collaborative, please see their [interim learning and impact report](#).

This case study is [one in a series](#) that looks at how teams have implemented the Value Management approach.



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“Thinking about some of the projects that we've taken on, the people that have really championed them have been your more junior grade staff...

...they were the ones that wanted to be really involved to make some changes because of something that wasn't so good”

Service Manager

Value Management: A way of working

In all settings teams had some understandable initial concerns about starting something new with a new language and new tools at a time of change and pressure. The COVID19 pandemic brought additional and at times extreme, pressure. In spite of this, teams in both NHS Highland and NHS Forth Valley continued with Value Management work, at least to some extent, and reported finding it beneficial through this period.

Several mental health teams and their managers in both boards have **incorporated Value Management methods** into their way of working. See the next page for some more detail, but in overview, this includes:

- Using the **visual management board** (physical, digital or both) to display data over time, linked analyses and related improvement work
- Populating the **box score** to organise real time data on the team's operation, including safety, capacity and cost
- Taking a whole team approach with **regular multidisciplinary huddles** enabling the team to discuss data, share learning, identify and agree areas for improvement and make plans to take these forward.
- Most of these teams prioritised finding effective ways to encourage submission of **staff and patient experience information** which forms an important source of data and improvement ideas.

Below is an example of an improvement that one of NHS Forth Valley's teams made using this approach.

Example: Staff feeling supported and safe

At the huddles staff wellbeing was identified as an issue in relation to their Joy at Work. Through engagement with staff it became clear that two aspects affecting this were how safe and how supported staff felt.

The team updated their box scores to **collect data** to understand the issues, as well as key **reasons** for it.

They tested change ideas, including increasing the proportion of staff per week receiving managerial supervision, completing appraisals and increasing the visibility of senior staff within the ward.

Over time for respondents the medians increased to 94% feeling supported and 97% feeling safe.

Ward 3 was subsequently awarded accreditation status by the Royal College of Psychiatrists.

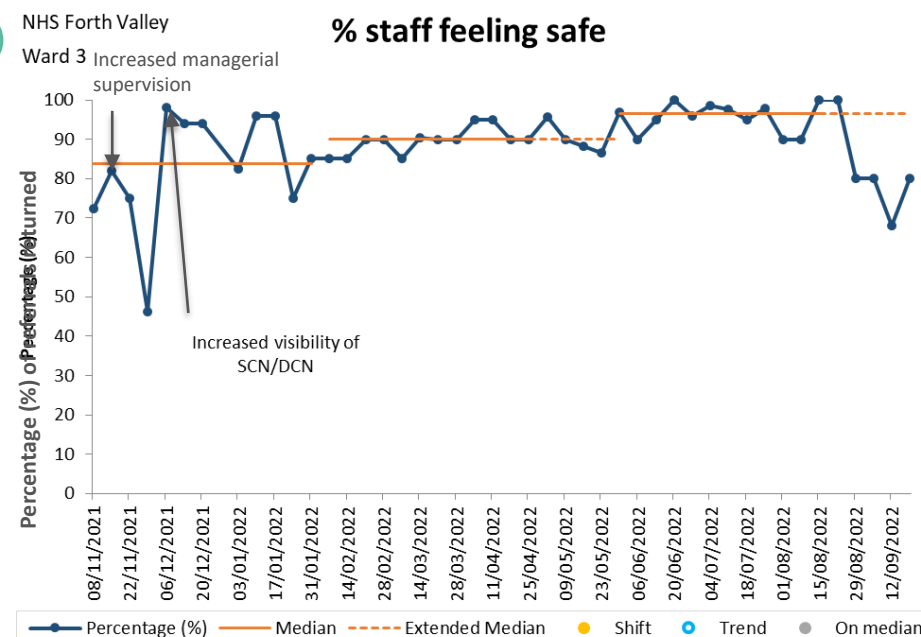


Figure 1: Ward 3 percentage (%) of staff respondents feeling safe

Introducing Value Management tools



Weekly Value Management Huddles

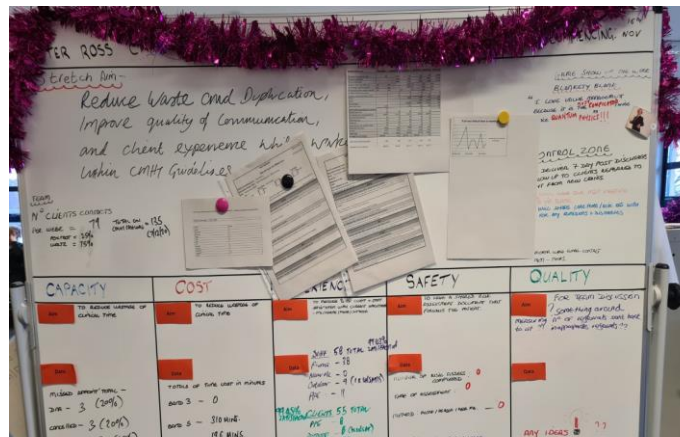
Method

The weekly huddle (or “report out”) drives a whole team approach and is multidisciplinary - involving other professions as much as possible for instance, nursing, health care support, social work, occupational therapy, psychology and psychiatry along with other team members from administration, management, finance and data.

Outcome

In many instances team members have engaged and taken ownership, overcoming early scepticism.

The huddle generates ideas and plans for improvement, facilitating common goals and increasing the team’s sense of cohesion.



Visual Management Board

Method

Accessible to the whole team, the Visual Management Board displays current improvement activity, priorities, and related data.

NHS Highland mental health teams generally maintain two versions of the board: a physical white board, and a digital Excel spreadsheet version for those attending virtually.

Outcome

When both digital and physical versions are available, they are complementary, with some using the digital to have a deeper look at the data, in particular on costs, a coach remarking, *“I don't know if they would have done that... had it just been the box score on the board”*.



Box Score

Method

The **box score** is populated with data relevant to the team and organisation’s current priorities.

The team lead (initially with coach support) manages the process of populating the box score (with finance support) and updating this onto the visual management board. Admin/data support for this can significantly help the team and enable them to focus on improvement activity.

Outcome

This helps team members take an increasing interest in their data and what it means, particularly the visual representations.

For some issues data collection and review assures the team of their performance, supporting decisions on whether or not improvement is currently a priority.

The difference Value Management has made



Improvement culture – a way of working

There is general agreement that Value Management is now a business-as-usual way of working for at least several teams and that it has helped develop the culture of improvement, with multidisciplinary teams defining priorities and making changes.

The language is understood beyond teams helping build wider local support.

“the biggest success is around culture and that’s hard to measure; that culture of improvement”

Coach

“I think Value Management has been useful for [flattening hierarchies] because I don't think there are other forums where a consultant psychiatrist and senior nurse would be sitting in the same room as a nursing assistant”.

Consultant

“Value Management transformed how I led my team: my focus became very data driven, and I was able to evidence all the good work my team were doing as well”.

Former Team Lead

Improving services

In NHS Highland and NHS Forth Valley, staff noted the usefulness of a Value Management approach (including access to relevant data) in positively and proactively responding to inspection agencies.

“[Managers] see the benefits: if the [Mental Welfare] Commission wants work on care plans, we need to put this through Value Management. It brings a weekly focus and data, and becomes the work of the team. This is how you get things done now”.

Coach

Capacity and staff development

Managers in NHS Forth Valley mental health services consider the increase in staff QI capacity to be significantly better than previously achieved before, despite past investment in training.

The extent of career progression too is notable among individuals involved in Value Management in both boards, with one also pointing to her leadership skills development.

“what I wanted was ...a staff team that had a better grasp of quality improvement and I've got that”.

Manager

Improvements made

Value Management mental health teams in both these NHS boards have delivered a range of improvements including, for example:

- Introduction (and assurance) of discharge pauses enabling reliably safer discharges
- Decreased rates of GP referral returns, reducing delays in care
- Prompt care planning and risk assessment on admission leading to reduced lengths of stay
- Patient safety (for example, through rigorous adherence to clothing lists)
- Staff experience

For more information



This report complements and builds on a series of case studies that looks at how teams have implemented the Value Management approach.

Read the Value Management case studies on [our ihub webpages](#).

For more information on our Value Management collaborative, contact: his.valuemgt@nhs.scot.

Acknowledgements



The Value Management Collaborative National Team would like to extend a big thank you to colleagues in NHS Highland and NHS Forth Valley for their time and generosity in sharing their experiences and learning.

Method



This report compiling insights from participants was prepared using information from the following sources:

- A review of previously conducted case studies and information collected in Phase 2 of the Value Management Collaborative.
- **Exploratory/planning meetings** with Healthcare Improvement Scotland and NHS Education for Scotland colleagues, and with locally based Value Management Collaborative Coaches in NHS Highland and Forth Valley working with mental health teams.
- **4 interviews/discussions** conducted with the Value Management coaches, with clinical and general management staff working closely with the teams in these boards (6 informants in total).



It's based in the real world. So the staff said that this this relatively small thing was making their working life much more difficult and we could tangibly and practically do something to improve that. And we had evidence to be able to reassure ourselves that it was money well spent.

Service Manager

Just being able to see that we have got senior managers there that are hearing everything that's going on and how it feels for the staff is usually beneficial for them and for me.

Team Member

Value management is “a way of giving staff ownership to make improvements in what matters to them”.

Manager