WRaPT

NHS
Health Education England

Workforce Repository and Planning Tool

Creating a Standard Baseline report

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Useful Terms

Baseline: An amalgamation of several datasets from multiple sources to produce one unified master dataset.

Baseline report: A visual and or written presentation of the baseline datasets after analysis

Information Sharing Gateway (ISG): An online tool hosted by UHMB, used to process data sharing agreements.

Introduction

This guide is designed to help you through the process of producing a WRaPT Standard Baseline report. The standard baseline report template is embedded here and the process of populating this will be described below.

Standard baseline April17 v2.0.pptx

Scoping

The first step is to identify the organisations that are within scope of the baseline by speaking to the project sponsor. The project sponsor should be able to direct or assist in identifying the workforce leads in each organisation. Alternatively, the workforce information teams in HEE should be able to advise and / or provide workforce contacts by organisation, which can then be validated back with the project sponsor.

Information Governance

Following the identification of organisations in scope of the baseline, a data sharing agreement in the Information Sharing Gateway (ISG) should be created (instructions on how to do this can be found in the “WRaPT ISG Manual”). Some organisations may need to register if they are new to the ISG; again instructions around this are available in the “WRaPT ISG Manual”.

Whilst the ISG will automatically send a notification to the IG leads in each organisation, it is also advised that an email is sent to the IG contacts to raise awareness and also requesting sign off of the data sharing agreement. Email addresses for the IG leads can be extracted from the ISG, (these will require you to copy and paste individually from the ISG tool into your email). Within the email, copy in all the workforce contacts that have been identified at the Scoping stage, so that the IG leads are able to contact the relevant person in the organisation should they have any queries.

Primary Data Collation

Firstly, check the WRaPT (tool) to see when each organisation has last uploaded data into the tool. Inform the project sponsor if data is already available and ask them to make a decision whether it is viable to use. If the answer is yes, download the data from the tool.

If the data is not available, email the provider organisations in scope, with instructions on populating the WRaPT workforce template and uploading into the WRaPT tool. In addition to the staff in post details, you would also request Bank and Agency data from the organisations to understand additional demand on services and the status of the temporary workforce being deployed

Approaches will differ by organisation type in completing the workforce data request.

Workforce Staff in Post

- NHS organisation: use ESR, run "WRaPT Staff list" report. Data to be uploaded into WRaPT
- Non NHS – Manual entry into the WRaPT template below. All mandatory fields should be completed. Data to be uploaded into WRaPT.

Workforce UploadTemplate (Jan

Bank and Agency data

- All organisations: Manual entry into the Bank and Agency data template below. Data should be requested from the organisation's finance departments over 12 month time frame.

B&A template.xlsx

Publicly available data sources (Academic baseline)

If a primary data collation is not feasible, it is possible to create the baseline report from publicly available data sources.

Data type	Source and Link	Instructions
NHS Organisation level	NHS Digital Workforce Statistics report: https://digital.nhs.uk/catalogue/PUB30165 .	An example link to December 2017 report has been provided here. Download the latest publication and extract the data for the organisations that are within scope.

Primary Care	NHS Digital Healthcare Workforce Statistics publication - https://digital.nhs.uk/catalogue/PUB30059	An example link to December 2017 report has been provided here. Download the latest publication and extract the data for the organisations that are within scope
Social Care	NMDS https://www.nmds-sc-online.org.uk/reportengine/GuestDashboard.aspx?type=StaffProfile	Start with the NMDS dashboard, filter by region or local authorities. Reports are also available by each area

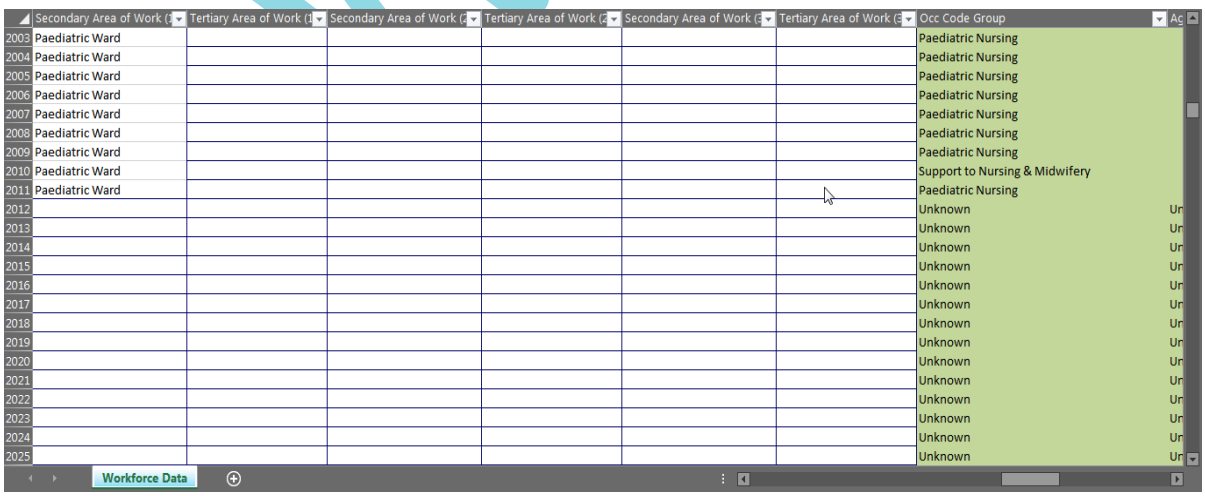
Once the data has been sourced and extracted, ensure it fits into the WRaPT template (embedded above).

Populating the Field creator

Sort the data for each organisation by FTE and remove all 0 FTE records from the dataset. Then copy and paste the data into the field creator template into the correct columns. Be careful only to copy the data columns and not the entire sheet or you will overwrite the calculated fields in green. These lookups in green group the data together, allowing for a standard level of analysis for each provider.

Field creator template.xlsx

Delete excess rows beyond the end of your data in order to delete the unneeded calculated fields. In the example below you would delete from row 2012 onwards.



	Secondary Area of Work (1	Tertiary Area of Work (1	Secondary Area of Work (2	Tertiary Area of Work (2	Secondary Area of Work (3	Tertiary Area of Work (3	Occ Code Group	Ag
2003	Paediatric Ward						Paediatric Nursing	
2004	Paediatric Ward						Paediatric Nursing	
2005	Paediatric Ward						Paediatric Nursing	
2006	Paediatric Ward						Paediatric Nursing	
2007	Paediatric Ward						Paediatric Nursing	
2008	Paediatric Ward						Paediatric Nursing	
2009	Paediatric Ward						Paediatric Nursing	
2010	Paediatric Ward						Support to Nursing & Midwifery	
2011	Paediatric Ward						Paediatric Nursing	
2012							Unknown	Un
2013							Unknown	Un
2014							Unknown	Un
2015							Unknown	Un
2016							Unknown	Un
2017							Unknown	Un
2018							Unknown	Un
2019							Unknown	Un
2020							Unknown	Un
2021							Unknown	Un
2022							Unknown	Un
2023							Unknown	Un
2024							Unknown	Un
2025							Unknown	Un

Workforce Data

Go to File > Save As and change the type from CSV (*.csv) to XLS (*.xls), it will ask if you only want to save the active sheet, click yes or continue, it will warn you about loss of features, agree to that too.

Troubleshooting:

- Review the columns in green and ensure there are no errors.

- If the part time/full time, permanent or gender statistics are coming up with errors, ensure the wording is exactly what the formula expects: everything that is not “Part Time” is interpreted as Full Time, everything that is not “Permanent” is Temporary and everything that is not “Male” is Female. Capitalisation does not matter but other formatting (such as excess spaces) do. E.g: “male” and “Male” are detected as male, but “M” or “Unknown” would show up as female.

- Medical and dental lookup is only specific to medical grades, to check if all of these have been identified filter on the Staff group column and select Medical and Dental. If there are any blank fields check the role and see whether you are able to allocate a grouping, otherwise record as “Unknown”

Creating a Master dataset

Now that the data is all in the same format, open up a new excel file (.XLS), In Sheet 1, cell A1 write down the heading “Org”. Open the first field creator sheet that you created. Copy and paste the headings starting at cell A2. Then copy and paste the data from each of the field creator sheet into Sheet 1 populating column A with each organisation name. Paste the data one below the other, thereby creating a master dataset. Rename this sheet to ‘Master data’.

Record any data quality issues and any assumptions that have been made within the dataset on to a new tab within the workbook (i.e. all rows with 0 FTE removed, junior doctors not included, ‘Not stated’ and ‘Blanks’ have been grouped together for Age bands in X organisation, Gender is missing for Y organisation). Rename this tab to ‘DQandAssumptions’. You will need to refer back to this later when you create the slide pack.

Creating Data Tables

In the master datasheet, create new tabs for:

1) Summary, and
b) Each individual organisation

You should now have a series of tabs next to your master datasheet starting with “Summary”, then “Org 1”, “Org 2” etc.

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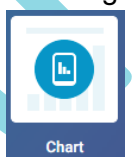
Go back to the master data sheet. Insert a new pivot table. Create the tables below by overall summary level and then by each provider organisation. Once each table is produced, copy and paste the table into the relevant sheet:

- Total HC/FTE
- Staff group / WTE
- Staff group / Age / HC
- Role / WTE
- Role / Age / HC
- Participation Rate / WTE
- Staff group / Payband / WTE
- Medical payband / WTE
- Gender / WTE
- Gender / Age / HC

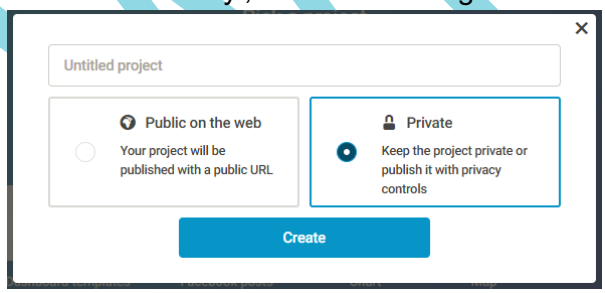
Creating Graphs

Once the tables have been set up, graphs can be created in Infogram or any other data visualisation tool i.e. Microsoft Excel or Tabelau. Infogram has been used as the example in this report.

a) Start with the 'Summary' sheet in your excel file. Create graphs for each table.

b) Login to Infogram www.infogram.com . Click on 

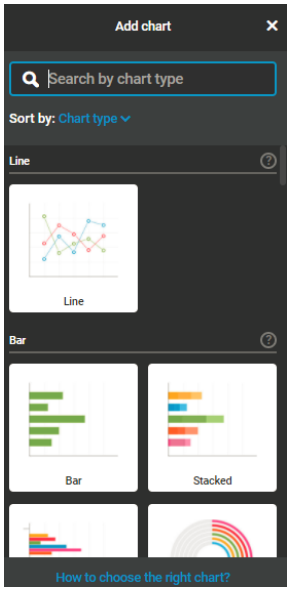
c) Name the report according to the sheet and project i.e. 'Lancashire and South Cumbria- Summary', leave the setting to Private and then click on 'Create'.



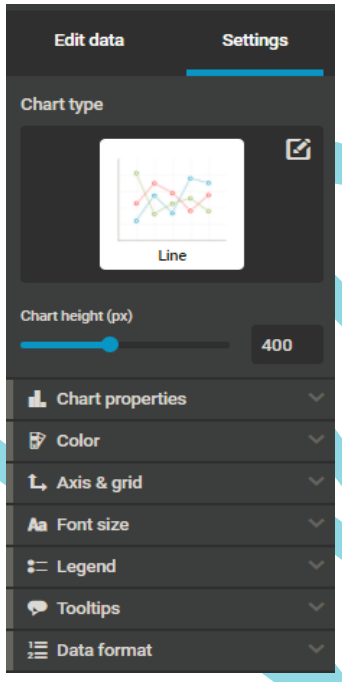
d) Go to the left hand navigation menu and click on

to insert a title, and then click on to insert a new graph.

e) Select the most appropriate graph based on the data in the table. Examples of graphs that the WRaPT team have used are available in the Standard Baseline template embedded above



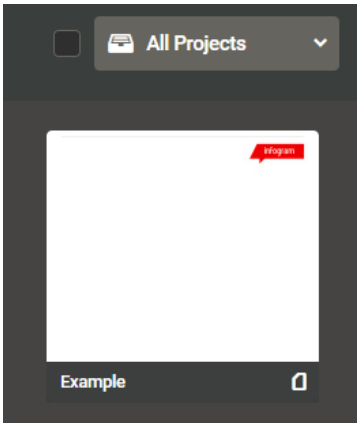
f) Once the graph has been inserted click on to it. A menu will appear on the right as below:



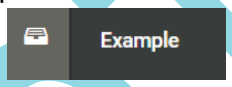
g) Select 'Edit data'. Then copy and paste the data from the excel table into Infogram.

h) Repeat this for all tables.

i) Once all the graphs for the 'Summary' view have been created, click on the following icon in the top left and it will take you pack to the Infogram library page. You will be able to see this document in your Library and it will look as follows but named accordingly.



j) Select the file then click on the top 3 dots in the top right (where it is currently showing the Infogram label), select the option to duplicate this file.

k) Open the duplicated file then click on the 

icon in the top left of the screen and rename the file according to your next provider organisation tab in the excel file.

l) Click into each graph to edit data and update, copy and paste data from your tables into the relevant graphs.

m) Repeat this process for each organisation so you have a set of infogram reports, one will be a summary level, the other will be by individual organisation.

Analysis

Go back to the excel file with all the tables. Now you can conduct analysis on each of the tables.

Start with the following:

- % of HC and FTE by each organisation within the total
- % of Staff groups within the total
- % of Staff groups by Age and the largest presenting groups
- Number of Roles within the total
- Top 10 roles
- Top 10 Roles by Age and the largest presenting groups
- % of Full Time and Part Time staff
- % of B5 and B6 Nursing Staff
- % of Consultants or largest appearing Medical role
- % of female / males within the
- % of Gender by Age

Look out for anomalies and trends. Summarise the key findings on each tab writing a few bullet points on each page; these will be used in the slide pack.

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Updating the Slide pack

Open up the example slide pack embedded above and rename this according to your project. Update each section as relevant to your project.

- Overview: change the name of the project and ensure all organisations within the project scope are included.
- Org Structure: update the overview and populate with HC and FTE by each organisation
- Data Collection: update the tables by checking each field and recording data that is available.
- Workforce Baseline and Analysis: this section will make up the bulk of the slide pack. Go back into Infogram or whichever program you have used to create graphs. Screen print each of the graphs into the relevant pages of the slide pack. The template starts with the summary view and then goes into each organisation level. If there are more organisations in your project than in the example template then copy and paste the slides as required.
- Next Steps: update depending on what action is sought

Once all the graphs have been transferred over into the report, update the narrative sections using the analysis already conducted. Ensure the key findings from each tab are copied into the correct pages.

Quality Assurance

Independently sense-check the report thoroughly, starting with:

- Checking the graphs for data anomalies
- Checking the graphs are in the right sections
- Checking the narrative for data anomalies
- Checking the narrative is in the right sections

It is recommended that you send the report to your manager for quality assurance (QA). Once QA is complete send the report to the project sponsor, requesting sign off of the report by a given time frame.

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APPENDICES

Number	Detail	
1.	Standard baseline report example	
2.	WRaPT workforce data template	
3.	Bank and Agency data template	
4.	Field Creator template	
5.		

Link to other WRaPT documents

Number	Detail	
1.	WRaPT ISG Manual	
2.	WRaPT Software Manual	
3.		
4.		
5.		

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