SERVICE WORKS GLOBAL
PART OF ADDNODE GROUP

CASE STUDY

# Southern Health NHS Foundation Trust

**Project:** To implement a centralised CMMS application to rapidly co-ordinate and control planned and preventative maintenance services via a mobile app. The system must be flexible and expansive to grow with the demands of the Trust and the services they provide.

**Objectives:** To support expansion of services over a wide geographic area, enabling the effective control of maintenance and improving communications with remote staff and customers.

**Results:** Enhanced standards of patient care through comprehensive workflow, task and lifecycle management and the centralisation of business-critical information, allowing the Trust to deliver optimum value to the community.

## Leveraging Technology to Support Estate Services

Southern Health NHS Foundation Trust provides specialist mental health and learning disability services for people of all ages across Hampshire and its surrounding area. The Trust operates across 280 sites.

The Trust's Works Department is responsible for ensuring the timely delivery of facilities and maintenance services to its portfolio of circa 60 properties, as well as to the third party NHS institutions that they work with. Services are delivered by an in-house team and external contractors, covering a wide geographic region, often in remote areas. Many staff are field based, so reliable communication and workforce tracking is key to delivering high quality facilities.

## A Future-Proof CMMS System for a Modern Healthcare Model

As the scope and geographic coverage of their services grew, Southern Health NHS Foundation Trust required a centralised system that could rapidly co-ordinate and control maintenance to ensure the ongoing provision of high- quality health services. The current system, in place for 20 years, no longer met their needs and managed maintenance requests and facilities staff on a region-by-region basis. The Trust wanted to centralise the management of maintenance services by providing a single point of contact via a facilities help desk, as well as improve communications with remote engineers and their customer base.

Carole Moor, Help Desk Manager, summarises: “The new system needed to be flexible, expansive and have the ability to grow with the demands of the Trust and the services we provide.”

Following a tendering process, QFM was shortlisted along with several other CMMS solutions. Southern Health NHS Foundation Trust undertook reference site visits with several of Service Works’ clients, which “effectively demonstrated QFM’s capacity to manage both internal staff and contractors,” says Moor. “We were impressed with QFM’s ability to support a busy help desk with a high volume of calls, and with the system’s extensive reporting capabilities.

Moor adds:

**QFM was one of the most customer focused systems that we saw, and we were confident it would allow us to manage our customers’ expectations.”**

QFM was selected in late 2007; and went live the following spring. A phased approach was taken to the roll-out of QFM, with the system initially being used to manage service events only. During the first week alone, QFM enabled the Trust’s help desk to successfully log and manage 250 service calls.

The Trust is in the process of implementing a self-service portal, enabling hospital staff and customers to log maintenance requests through a simple, secure web interface at any time of day or night.

## Efficiencies Achieved Through Centralisation

QFM now manages all reactive and planned maintenance events, from the smallest minor improvements to the largest capital projects. Preventative maintenance tasks and the management of resources are also controlled through QFM, ensuring that the Trust’s estates department has full visibility and control of costs, performance and service delivery via one integrated system. All of Southern Health NHS Foundation Trust’s facilities and estates performance reporting is driven from QFM’s suite of over 200 reports. Since project launch, almost 20,000 jobs have been managed using QFM.

Alison Edmundson, Head of FM Governance and Performance, comments: “QFM allows us to effectively manage events from inception to completion, rather than simply tracking staff resources as we did previously. It has allowed us to dramatically improve our reaction time and speed of service. Our customer base is able to talk to someone and know that their issue will be dealt with promptly. To date, QFM has allowed us to successfully manage almost 20,000 facilities and maintenance jobs.”

In addition, QFM’s comprehensive event costing capabilities allows the Trust’s works department to fully manage the cost elements associated with each event,

as Edmundson explains:

> **QFM has transformed the speed at which we can invoice for services. We can be far more proactive in providing accurate information to our finance department, who, in turn, is able to deliver more timely invoices to customers and drive revenue."**

## Moving Forward with CMMS

In 2009, Southern Health NHS Foundation Trust extended their use of QFM by deploying the system to their field-based staff via mobile technology. The QFM app allows the Trust's help desk to dispatch work orders to their engineers and contractors in real time via a smartphone. Field-based operatives can update details of the job on their mobile, from notification through to completion, reducing the administrative load on the helpdesk.

The Trust later introduced QFM's Dynamic Forms, allowing customised forms and checklists to be attached to jobs. The forms allow operatives to quickly and efficiently enter the required information around jobs such as asset inspections, building condition surveys, health and safety checks or customer satisfaction surveys. Everything is saved centrally on the system to ensure the Trust has immediate access to vital operational information. Operatives can also use the forms to report issues or raise sub tasks in relation to their current job, for example if they cannot access the work location or require assistance from another team member. This provides a full audit trail to ensure the Trust meets its compliance obligations, and has streamlined its way of working.

## Integration Touchpoints

QFM has already been seamlessly integrated with the Trust's building intelligence (BI) tool to provide real-time reporting and analytics. This integration also allows Trust Board members access to information via QFM's self-service functionality, providing transparency on estate performance and status of facilities and estate related activities.

In a bid to improve their reactive reporting, the Trust will also be integrating its building management system (BMS) with QFM across the estate. The BMS system will be programmed to automatically log a building fault via the QFM help desk system, rather than waiting for this to be noticed and reported manually. They are also looking to implement some proactive measures by setting building parameters to include lighting, power, fire alarms, access controls and heating ventilation, so that the team is automatically notified of alarms and alerts (e.g. when a building is getting too cold) and can respond accordingly. This will provide the Trust with wider visibility of the estate's performance and help to reduce energy usage and spend.

## Future Focus

As NHS Trusts across the UK continue to consolidate, and following the release of the Lord Carter Report and Estates Return Information Collection (ERIC) reporting, estates departments are under increasing pressure to rationalise processes, centralise information, improve efficiency and reduce operational spend. To help meet these objectives and following a review of Southern Health's approach to estates management and agile working, the Trust will be looking to roll out electronic booking.

The collaboration between Southern Health NHS Foundation Trust and Service Works Global demonstrates how technology can be leveraged to streamline facilities and estates operations, enhancing the standard of patient care and delivering optimum value to the community.

Moor concludes: "We pride ourselves on being a customer focused organisation and QFM is a critical part of our business operations. The system has dramatically improved communications between the estates department and our hospitals and clinics across the region. It drives revenue and, more importantly, ensures the ongoing provision of high-quality health services to which we are committed."