

<b>Trust Board meeting (Part 1)</b>	<b>Date:</b>	<b>24 June 2015</b>
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Agenda item	Title	Executive Director lead and presenter	Report Author
<b>BD/15/080.1</b>	<b>IQ Metrics</b>	<b>Andrew Dean, Director of Nursing and Quality</b>	<b>Toby Rickard, Head of Business Intelligence</b>

**This report is for:**

Decision	X
Discussion	
To Note	

**History**

*Quality and Standards Committee, 18 June 2015*

**The following impacts have been identified and assessed within this report**

Equality	None identified.
Quality	None identified.
Privacy	None identified.

**Executive summary of key issues**

This report presents an overview of the planned changes to IQ, for discussion and approval. The revised approach restructures IQ, moving away from the 'seven domains of quality', to one that organises information under the five headings used by the CQC. An aggregated position is presented for each of these headings which use performance against a range of metrics to generate a 'risk score'. This score will be used to indicate areas of concern and places where further investigation is required.

In time, a forecasting element will be added, that uses the trajectory for each metric to forecast how the Trust and localities will score in the next month. This may be either positive in that the risk score is reduced where an upward trajectory is seen or negative by increasing the risk scores where the trajectory suggests that indicators that are currently above target will not be by next month.

The Board is asked to make a **decision** regarding planned changes.

**This report addresses these strategic priorities:**

We will deliver the best care	X
We will support and develop our staff	X
We will continually improve what we do	X
We will use our resources wisely	X
We will be future focussed	X



# 1 Introduction

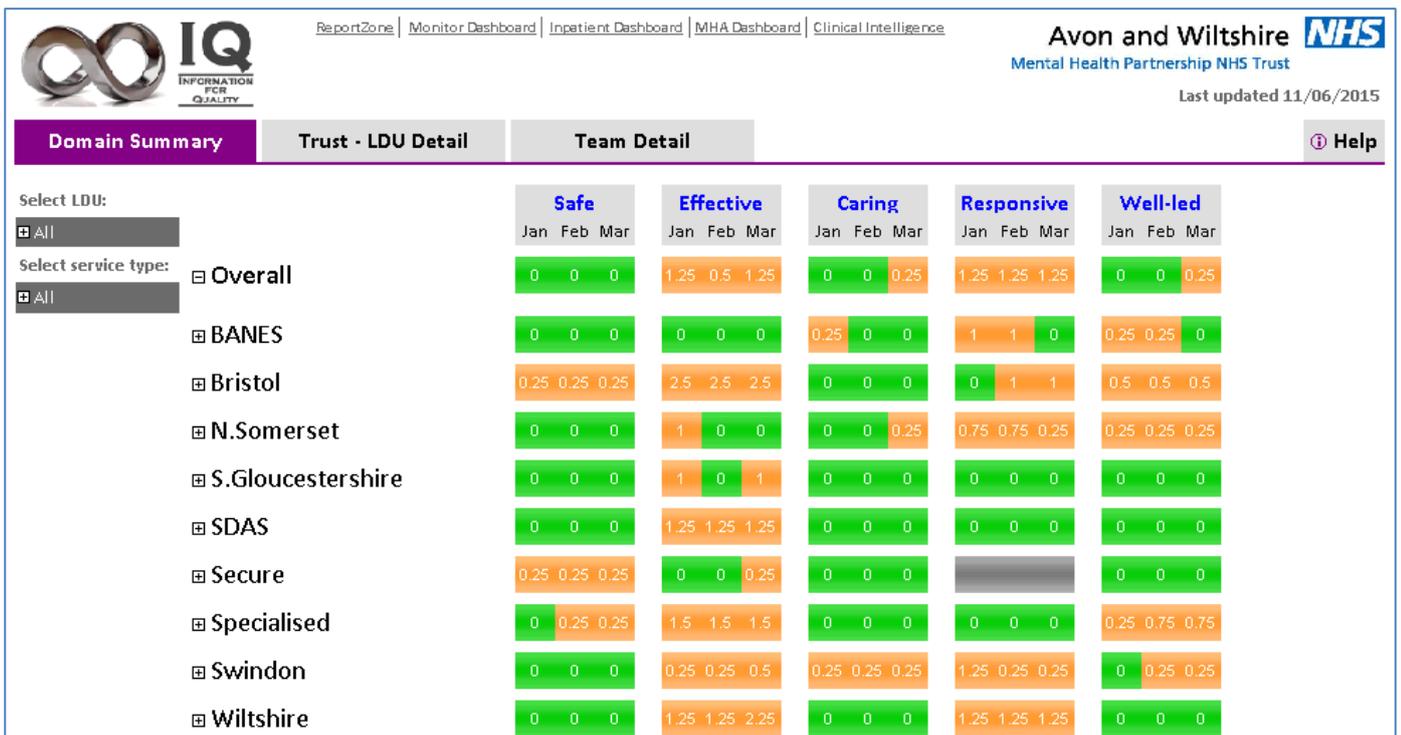
The Trust has been working to update IQ for 2015-16, following initial input from localities (led by the Quality Academy) and then with input from the new Director of Nursing. This paper sets out the planned changes and includes screen shots of the new look. **It is important to note, that the scores presented here are illustrative and not based on a full set of live data.**

# 2 Front Screen

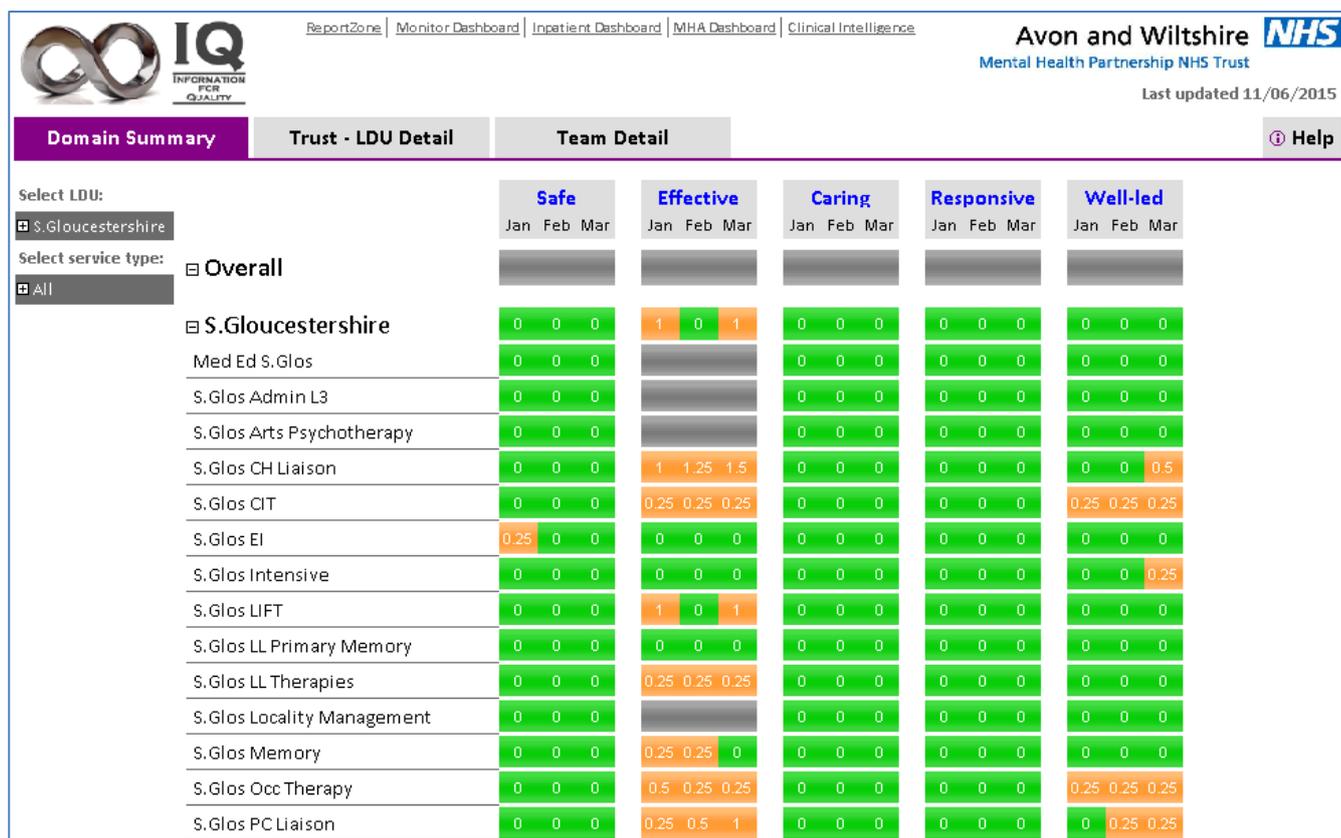
The landing page of IQ will be updated to organise results for each locality, with separate aggregated results for each CQC domain (see below for mock-up). The front page will:

- Present an aggregated risk score, based on the results for each indicator included within that domain (see below for details on how risk scores work)
- Show the risk score for the current month and the two months prior
- Show a forecasted risk score for the coming month based on the trajectory seen for each indicator (this won't be in place for the initial release, but will follow)
- Localities will be able to select their area, then drill down to show results for all teams and wards in their area

## New IQ: Locality view



## New IQ: drilled down to single locality, with team / ward detail



## 3 Calculating risk scores

### 3.1 Approach

The risk score approach is borrowed from Monitor's Risk Assessment Framework and has been in place in IQ since the original launch, albeit only within the Contract Monitor section. This revised approach applies the same principles, but for all indicators.

#### How it works:

The approach allocates a risk score to each indicator, based on performance against the target for that indicator. A result above target, attracts a risk score of 0, with points added for results below target (either in Amber, or Red zones).

Results are then added together and an overall score created.

For example for team 1:

CQC domain	Indicator	Performance	Risk score
Safety	Annual reviews	70% (target 95%)	1.0
	Gatekeeping	98% (target 95%)	0.0
	Supervision	88% (target 85%)	0.0
<b>Total risk score for safety</b>			<b>1.0</b>

For example for team 2:

CQC domain	Indicator	Performance	Risk score
Safety	Annual reviews	96% (target 95%)	0.0
	Gatekeeping	10% (target 95%)	1.0
	Supervision	10% (target 85%)	1.0
<b>Total risk score for safety</b>			<b>2.0</b>

### Flexibility:

There is scope in this approach to weight indicators differently, with more 'important' indicators attracting a higher risk score.

*By way of example, in Monitor's framework, a never event attracted a risk score of 4, triggering immediate investigation and action, compared to the data quality indicators that attracted a score of 0.5.*

Engagement with clinical colleagues in agreeing this approach will be done under the auspices of the Quality Board with an initial set of weightings to be agreed prior to new IQ going live.

## 4 Supporting pages

IQ will also include supporting pages that present results for each indicator included under each CQC heading and the results at locality and team / ward level. The functionality / filters remain similar to those in place in IQ already. As follows:

The screenshot shows the IQ dashboard interface. At the top, there are filters for 'Select an LDU (or All): All', 'To view the 'Commissioner Scorecard' select 'Yes': No', 'Start of period: December 2014', and 'End of period: May 2015'. Below this is a navigation bar with 'Trust - LDU' selected and 'Team' as an option. The main content area is titled 'Are our services SAFE?' and displays a table of performance metrics for 'Trustwide' across six months (Dec, Jan, Feb, Mar, Apr, May) for the periods 14-15 and 15-16. The table includes indicators such as '7 day Follow-up to discharge', 'Discharge Summaries sent', 'Under 18 to adult inpatient units', 'CPA Service Users with a Risk Assessment', and 'CPA Service Users with a Crisis Plan'. Each cell in the table contains a percentage value, often with a green or orange background indicating performance relative to targets.

Trustwide	14-15			15-16		
	Dec	Jan	Feb	Mar	Apr	May
7 day Follow-up to discharge	97.6 %	97 %	96.9 %	95.5 %	94.9 %	94.7 %
Discharge Summaries sent	94.4 %	93.2 %	91.3 %	91.2 %	93.2 %	94.8 %
Under 18 to adult inpatient units	0	0	0	0	0	0
CPA Service Users with a Risk Assessment	99.9 %	99.9 %	99.9 %	99.9 %	99.8 %	99.9 %
CPA Service Users with a Crisis Plan	90.3 %	89.9 %	89.8 %	89.8 %	90.1 %	89.9 %

## 5 New features

The system will also have a number of new features, as follows:

- **More months:** on the indicator detail pages, the user will be able to adjust the number of months included in the display, going back more than six months (which is currently the limit in IQ)

- **Visuals:** an indicator detail report will be available that presents the user with comparative information for a given indicator, as well as a visual representation of the trend in performance over time.
- **More indicators:** more indicators have been developed and included for the initial release, with more planned to follow as the data becomes available. Examples include:
  - Safer staffing fill rates
  - Ward occupancy
  - AWOL count
  - Compliance with stat / man training

*It should be noted that the indicators in IQ will no longer mirror the CCG contract as they do currently and that separate scorecards will provide Commissioners with results as per the Quality Schedule.*

## 6 Recommendations

The Board should make a **decision** on changes outlined here.