Shift Review Procedure
Version 1.0

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1. Introduction

There is an expectation that from time to time there will be a requirement to review shift patterns. This document has been agreed in partnership to ensure that there is a consistent method of doing so, that patient safety is not compromised and that all criteria, which need to be considered by both staff and management, are taken on board.

2. The Requirement to Review a Shift Pattern

Staff and managers must undertake joint discussions regarding the need for a shift review.

As a guide a shift review may be considered necessary when one or more of the following examples occur:

1. An evidence based change in demand exists;

2. Patient care is being compromised;

3. Evidence based change in resources are becoming available to the station or work place (increase or decrease in staff);

4. Staff are requesting a shift pattern which better supports work life balance;

5. External development requiring a different working pattern/ arrangement;

6. Non achievement of performance targets e.g. operational or clinical;

7. Health and Safety or other statutory issue.

3.   Factors which would determine a shift pattern

These factors are not mutually exclusive and will interrelate with each other. It is expected that whilst revising shift patterns that each of the under noted factors would be assessed.

FACTOR	DESCRIPTION
Demand	The level and pattern of demand over agreed or identified period of time. Knowledge of any issues which will impact on demand significantly in the near future (external and internal factors).
Shift Model	A computer generated demand analysis which indicates the resources required to match demand closely.

	Proposed shift pattern should reflect this where practical and where not should clearly state the reasons for this.
Staffing levels	Current resources available in terms of staff numbers and hours. Knowledge of any proposed changes to this. Proposed pattern would need to demonstrate that the hours available were being used efficiently.
Cost	All shift patterns should clearly demonstrate patient benefit, value for money and be affordable.
Skills Atrophy	Proposed shift pattern would need to ensure that the risk of skills atrophy was minimised
Working time	Ensure that proposed shift pattern does not compromise our requirements under Working Time Regulations.
Shift pattern design	When designing a new shift pattern best practice shift design should be applied. The manager and staff should consider the advice provided by the HSE document HSG 256 – Managing Shift Work (Health and Safety Guidance). http://www.hse.gov.uk/pubns/books/hsg256.htm In addition all shifts must be run through the HSE risk rating assessment tool available through the H&S Dept.
Other considerations	Shift patterns should, where possible, take into consideration the needs of individual staff and recognise the impact of changes which support a more effective life work balance. The opinions and views of each member of staff must be considered, bearing in mind that it will sometimes prove difficult to satisfy everybody's wishes.
	Shift pattern should not increase: ☐ On call ☐ Length of shifts without sufficient rest time ☐ Number of night shifts without sufficient breaks and rest time. ☐ Overtime *Shift patterns should also recognise the Service requirement to have a paramedic on every shift. (n.b this does not include Urgent Tier).*

4. Process for agreeing shift changes

All local staff (representatives of recognised unions) and managers must be involved in the review and all information, which is used to decide on the changes, should be made available to all parties to review. The review is likely to e managed by the Area Service Manager (or equivalent level in other departments), with oversight by the Head of Service (or equivalent level).

The process is in 6 stages as follows:

Stage 1 - Need to review identified

Where there is sufficient need to review the pattern of working the staff or manager should give the reasons for the review and the target completion dates.

Stage 2 - Information gathering

All relevant information should be gathered and be made available to staff and managers at the location. This information can be supplied by 'specialists' such as Personnel, MIS, and Finance etc.

Stage 3 - Consultation

A representative group of staff, team leader and the manager should use available information to produce proposed shift patterns.

Where staff are willing and able to come up with proposals for management to consider then this should be encouraged.

Each proposal should be measured against the criteria and where there is an impact on response times, cost, patient care etc. this should be quantified where possible and sources of funding identified etc. It is expected that the manager will have a significant role in preparing this part of the proposal.

It is expected that a number of proposals will be discussed and assessed prior to the most effective one being agreed. It is also expected that there will be significant discussion around the criteria and how they should be assessed.

Stage 4 – Agreement

Agreement for changes should lie with local staff (representatives of recognised unions) and their manager.

Where there is failure to reach an agreement, which has been objectively assessed (by staff and manager) as being the most effective pattern of working (having taken on board all of the criteria) then this will be referred to a more senior manager for discussion.

Resolution may include such options as sending both parties back to seek more information with further discussion required; no change to the shift; or,

as a last resort, implementing a shift pattern which the senior manager deems appropriate in line with operational requirements and the factors in the table above. It is expected that an agreement can be reached in partnership about the final shift pattern.

Stage 5 - Implementation

The implementation date will depend on the significance of the change and the impact on staff. There will also need to be time for these changes to be made to the Global Rostering System and this should also be taken into consideration.

It may be that some individuals require some flexibility in regard to their pattern both in terms of start date on the new system. Management and staff are expected to take this on board where they can, but in all cases patent care will be paramount.

Stage 6 - Review

Evaluation is an important part of this process and it is expected that staff and management would agree a review period as part of the process. This period will depend on local circumstances and the significant of the change.

It is expected that the review would take on board the following factors:
- Honouring previously arranged holiday periods and special leave
- Response Times
- Sickness Levels
- Staff views
- Management views
- Health and Safety issues re shift design
- Cost

5. Review of procedure

This procedure has been updated as part of continual improvement programme within the Service focusing on ensuring best practice in partnership with Managers and staff representatives through a partnership working group. The policy will be formally reviewed on a continuing basis as part of this process and no later than the date on the front page.