Tribunal Advisory Committee, 5 September 2018

Partner Team operational report

Executive summary

1. Introduction

The purpose of this paper is to inform the Committee of the Partner team and its activity, provide statistics on panelist numbers and turnover (overall numbers including Panel Members, Panel Chairs and Legal Assessors), and provide information on upcoming recruitment and training activity.

2. Information system project update

The Partner Portal has now been fully incorporated in the partner recruitment process. Partners can book training course, change their personal data and submit unavailability through the portal. The first portal review has been completed, a second one will follow 12 months after the introduction of the portal.

3. Partner Numbers and Turnover

Appendix A shows the numbers of HCPC partners per month and the correlation of voluntary resignations, 8-year rule and terminations in relation to the total number of partners. We have seen 24 voluntary resignations in the last three months. Therefore the overall turnover is higher in comparison to the previous three months. This has been primarily triggered by the fact that 75 FTP partners had to go through self-assessment between May and July 2018 to be offered a 2nd term.

4. Panelist Recruitment and Training Activity

The tables below detail the activity for the latest recruitment campaigns and upcoming recruitment campaigns for panel members, chairs and legal assessors.

There has been no FTP recruitment since the panel member campaign in April 2018, but we in the planning stages for a large FTP lay campaign in October 2018. Registrant panel members will be recruited in addition to lay if necessary during the same campaign. We anticipate that the campaign will attract a large number of candidates.

5. Recent and planned panelist Recruitment Activity

Q1 (April – June)

Role	Number Required	Appointed
Panel Member CH	2	2
Panel Member OR	2	2

Panel Member RA	2	4
Panel Member AS	4	4
Panel Member HAD	4-5	3
Panel Member PYL	3	2

6. Training

The Partner team only delivers limited training opportunities during the summer break. Panel member refresher training will start again from September.

Role	Dates
Legal Assessor (New)	17 April 2018
Panel Chair (Refresher)	10 April 2018
Panel Chair (Refresher)	2 May 2018
Legal Assessor (Refresher)	17 May 2018
Panel Member (New)	21 and 22 May 2018
Panel Member (Refresher)	6 June 2018
Panel Member (Refresher)	12 September 2018
Panel Member (Refresher)	14 December 2018
Panel Member Lay Refresher	16 and 17 January 2019

7. Self-Assessment

The self-assessment has been piloted on the Partner Portal, using a small number of panel members. The feedback has been mixed and we decided to run a 2nd pilot next year (depending on the outcome of the performance review option paper). A total of 75 partners have gone through self-assessment between May and July 2018.

8. Decision

The Committee is asked to note the information provided.

9. Resource Implications

None

10. Financial Implications

None

11. Appendices

Appendix 1 – Partner Numbers and turnover 2017 – 2018
Appendix 2 – Partner Portal Review

12. Date of Paper

22 August 2018

Partner turnover

	2017									2018			2018			
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	July
Voluntary Resignations	2	1	0	7	5	1	0	4	2	6	4	2	3	8	0	13
8-year rule*	2	1	0	24	0	0	0	0	0	0	3	5	0	0	0	0
Terminations	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0
Total Leavers (Vol & Comp)	4	2	0	31	5	1	0	4	2	6	7	7	4	8	0	13
Total Number of Partners	660	670	676	666	670	685	702	698	696	690	689	689	700	692	707	708
Voluntary Turnover%**	3%	3%	3%	4%	5%	5%	4%	4%	5%	5%	5%	5%	5%	6%	6%	7%
Overall Turnover%	8%	7%	7%	9%	9%	9%	9%	9%	9%	10%	10%	10%	10%	11%	11%	8%

*Including failed renewal assessment
Turnover information does not capture those Partners who move from one role to another or those who leave one role and remain in another
YTD = Year to date

Partner Portal 1st Review June 2018

Background

The Partner Portal ('portal') is a CoreHR system with additional customised functionality specifically developed for the Partner team and integrated with Fitness to Practices' Charter system.

History of the System

Prior to the portal, Bond was used as the main data holder for partner data, recruitment information and reporting. From an IT perspective, Bond caused concerns over security and version upgrades. A new system was required to replace Bond. Bond was closed and removed from the server after the portal went live. The portal is now the main data master and data updates to Charter are run once a day.

The portal holds personal and contractual data for over 700 HCPC partners, and allows online recruitment and shortlisting. The reporting functionality can be accessed by departmental managers and the Partner team. Current partners can access the portal externally to update their personal data, book unavailability and training courses.

Evaluation Summary

The portal went live in early January 2018 and was launched to partners externally on 25 January 2018. User departments and partners were involved in the development and implementation processes.

A small survey was distributed to internal users to assess their satisfaction level and we received ten completed surveys back.

- Overall satisfaction levels are high
- Most users described the use of the portal as 'very easy', 'easy' or 'neither'
- Users commented on the number of notifications received
- A few knowledge gaps were identified and rectified (eg to enter 'commenced' to ensure only current partners appear in the report)
- Most users stated that they only use it once a month

Current Cost-Benefit Justification

The portal provides extensive benefits to the partner team and user departments, and created a new user experience for current partners and external applicants. The recruitment process has now been tested and implemented. Current partners are able to apply for a new role through the portal while external applicants are using the recruitment microsite. The resource impact is difficult to determine at this stage as not all of the functionality has been implemented yet. The online booking of interview slots, which is currently been piloted, will see a positive impact on resources as these processes are done manually over the phone by the Partner team at the moment. The reporting tool allows the partner team and user departments to access information quickly and reliable.

Needed Changes or Enhancements

The current Partner Portal version 23 and will require upgrading in Q1 20118/19. A final minor release is currently being considered which will address a small number of issues we presently encounter. A minor will require collaboration of CoreHR, Charter and the relevant user departments as well as IT to ensure a smooth implementation.

The major upgrade will remove the back office as well as changing the interface of the current system. It will be necessary going forward to account for major upgrades every 18 months due to Core's policy of n-2 to continue their full support agreement.

Analysis and Implementation

The purpose of this section is to gauge the completeness of the functional requirements and implementation.

1.1 Purpose and Objectives

The portal has met its purpose to drive change in process and procedure with its introduction. The portal is fit for purpose, supports the business in engaging partners and keeping pace with future regulatory developments, and introduces a fundamental change in procedures regarding the required functions of online recruitment, self-service for partners and the integration with Charter. It allows external partners to update their contact details, submit unavailability and access the group form. In addition to the set out objectives the customisation of the system supports the Partner team with reporting, self-assessment and booking of interview slots. Additional functionality will be explored further after re-consideration of the current performance review process.

1.2 Scope

A number of issues were identified after implementation and 'work-around' functionalities had to be put into place. Reporting for applicants' scores, additional questions and training attendees has to be run via BI reports and currently don't sit within the portal. The system only allows single assessment of application forms and a two-step structure had to be put into place.

1.3 Benefits

The portal has improved the data flow between partners, user departments and the partner team. Updates are instantly visible in the portal and the reporting tool means that user departments can run a number of reports at any point without having to contact the partner team. The portal improved the efficiency and accuracy of data entries and decreases data duplication resulting in time savings and greater accuracy. Beside reporting, the online recruitment services provides the most benefit to applicants, the partner team and the user departments due to its automated functionality. The online platform allows the partner team to run report without having to enter information for each applicant manually. Detail all benefits, quantifiable or non-quantifiable, and any quantifiable resources associated with each.

1.4 Development Cost

Further development will be required due to CoreHR's new policy of n-2. This means that the current version 23 will be no longer fulfil their requirements later this year. Going forward the system will require updates around every 18 months to comply with their policy (CoreHR Service Life Policy). Minor releases will no longer be supported. Further costing is currently been looked at and we are awaiting confirmation from CoreHR.

1.5 Operating Cost

The current maintenance cost is unchanged and sits with the IT department.

1.6 Training

The partner team conducted a number of training and drop-in session before going live. A substantial amount of manuals are available via the intranet. New administrators are offer 1-2-1 training if required.

Security

The purpose of this section is to determine if the system provides adequate security of data and complies with the GDPR.

1.7 Data Protection and Allowed Access

Partner data is restricted to users set up by the partner team. Users are only able to view limited data relevant to their area/partners. Applicants' data will be deleted after 12 months in line with the GDPR and relevant Terms and Conditions are in place for users of the online recruitment site.