Pathology Review
Stakeholder Engagement Report

1 Introduction
Active stakeholder engagement was identified as one of the key methods for achieving the aims and objectives of the Pathology Review. This report documents all the stakeholder engagement activities undertaken as part of the Pathology Review since it started in June 2010 to the end of the Due Diligence stage, July 2012.

2 Details of the stakeholder engagement
There are a number of different audiences with whom we must engage and this section of the report sets out the different stakeholder groups and describes the activities that have taken place with each group.

2.1 Pathology staff
Pathology services across the patch are currently provided by North Bristol NHS Trust (NBT), University Hospitals NHS Foundation Trust (UH Bristol), Weston Area Health NHS Trust (WHAT) and the Health Protection Agency (HPA). All are represented on the Pathology Review Project Board.

The pathology staff working in these organisations have been engaged in the review in the following ways:

- **Executive presentations**, Ruth Brunt, the NBT Chief Executive has talked to staff at sessions held in NBT, HPA, WAHT and UH Bristol about the vision for Severn Pathology and has listened to the views of staff about the proposed changes.
- **Staff engagement group**, all four organisations have nominated staff champions to join a staff engagement group which meets monthly. A role...
description has been agreed with the staff champions which describes how they will ensure that staff views are actively considered and actioned by the Project Team.

- **Frequently asked questions**, the staff champions have canvassed staff within their organisations to create a list of questions and the answers to these questions have been posted on the four local intranet sites. The list of frequently asked questions is regularly updated and will inform the content of the input at internal meetings, described below.

- **Project team members attending internal meetings**, the staff champions suggested that staff would prefer the Project Team members to attend their existing meetings rather than asking them to attend stakeholder events. As a result the Project Director, Clinical Lead and Project Manager have attended a number of internal staff meetings to answer questions and get feedback from staff.

- **Programme of staff exchanges**, staff working in the four organisations have taken part in a series of exchanges, whereby Biomedical Scientists and Medical Laboratory Assistants have spent time in each other’s laboratories. This staff exchanges have taken place in Microbiology, Biochemistry, Haematology and Cellular Pathology. Genetics staff are already consolidated at NBT.

- **Senior Leadership workshops**, all staff on a band 8 or above have been invited to attend workshops to help them lead staff through all the change that is proposed. It is hoped this will not only be of benefit to them but also to the staff they manage. Over 80 members of staff have attended a workshop and a full evaluation report is available.

- **Lean events**, two events have taken place to share the work going on across Severn Pathology to make the service more productive and efficient. Forty members of staff attended the event on the 13th of December, 2011 and 48 members of staff attended a follow up event on the 14th of March, 2012. Reports from both events are available.

### 2.2 Trade Union representatives

A Human Resources Steering Group, which has meet monthly since February, 2012 helps to ensure that lead trade union representatives (up to two representatives from each of the four organisations) are involved and engaged in the development and delivery of the Human Resources work programme. Steering Group meetings are coordinated to ensure that any decisions which need to be ratified by each organisation’s Joint Consultative Committee can be discussed in these forums as quickly as possible.

### 2.3 Lay people

- **Lay Reference Group**, a lay reference group was established at the start of the review to provide a forum for patients and members of the public to contribute to the development of the review. This group had 10 active members and between them they represented the following conditions: haemophilia, breast cancer, prostate cancer, pituitary disorders, blindness and leukaemia. Both North Somerset and South Gloucestershire Local Involvement Networks (LINks) were represented in the Lay Reference Group. The Lay Reference group met regularly through the first part of the Review and was responsible for producing the key document ‘What Patients Want’. In September 2011 the decision was taken to close down the Lay Reference Group so that arrangements were better aligned
with the requirements of the subsequent phases of the project. Since disbanding the Lay Reference Group LINKs representatives have attended the Project Board meetings.

- **Lay engagement sessions**, four sessions for lay members have been run. The first session was held in January 2012, and 31 lay people attended. We discussed the role of pathology in a variety of patient pathways; why we plan to change pathology services; how we have involved lay people in the review so far; and what we are doing to make pathology services more ‘lean’. The second lay engagement session was held in March, 2012, and 23 people attended. This session concentrated on how we measure the quality of pathology services and the attendees gave us feedback on how they would like quality information presented to them. The third event took place on the 10th of May, 2012, and 22 people attended. There was a tour of the Blood Sciences laboratory following the route of a typical blood sample, information about the Severn Pathology commercial strategy and a hands on workshop looking at the new website. A forth lay workshop was held on the 18th of July, 2012 and 11 people attended. As this session the Link observers feed back to the group about the Advisory panel meeting held on the 9th of July and the group discussed the questions raised in the local authority impact assessment to get their views on whether the changes to pathology services are a substantial variation.

- **Lay Representatives**, have been members of the advisory panel and have attended both meetings of the Advisory panel to ensure that patients and carers have been adequately considered in proposals.

- **Dhek Bhal**, we have run a workshop with 14 members of the South Asian community to find out what makes a pathology service good in their eyes. We also asked them if they thought people with long term health conditions in their community would use technology to access their test results to prevent them having to visit their GP or Consultant.

**2.4 The public**

We are continuing to monitor media coverage of pathology services. We met with the health reporter from the Bristol Evening Post in December 2011, to provide a background briefing on the development of Severn Pathology and the review process. We are working with colleagues from across pathology services to identify stories of interest to the media and the public, to highlight innovation, best practice and improvements in efficiency and patient experience.

In response to a suggestion from a number of Bristol City Councillors a representative from the NHS met with the Consultation and Research team at Bristol City Council in December, 2012. The meeting was to discuss the possibility of broadening stakeholder engagement with the public by using e-participatory tools such as the Citizens Panel or Ask Bristol. In light of the timescales within the pathology Review and the existing engagement which had already taken place it was not felt to be appropriate as the e-participatory tools are better suited to being used at the beginning of an engagement exercise. However, e-participatory tools are being investigated for a Healthy Futures led review of rehabilitation services which is at a much earlier stage.

**2.5 Health Overview and Scrutiny Committee members**

The local scrutiny committees receive regular update briefings and newsletters on the review. We have also run two workshops for local Health Overview and Scrutiny
Committee members and a third is planned for November, 2012. The first was in November, 2011 where Councillors from all three local scrutiny committees were invited on a tour of the laboratories at the Pathology Sciences building. A second event took place on the 20th April, 2012. At this event the Councillors gave us feedback on the planned performance monitoring framework. This workshop was followed by a tour of the Learning and Research building at Southmead.

2.6 People working in primary care
We created a strategy for how we plan to engage with people working in primary care. In accordance with the agreed engagement strategy, we have spent time explaining our vision, strategy and progress to our organisational stakeholders and some primary care clinicians. This engagement is essential in ensuring that our current users are assured of continuity of the existing service and aware of our future plans.

We’ve identified 4 segments:-
- Segment 1: NHS
- Segment 2: Private Healthcare
- Segment 3: Non Healthcare Customers
- Segment 4: Private Individuals

Our focus for this work has initially been on the NHS segment, specifically:-
- Commissioners
- GP’s
- Practice Managers
- Trust Executives

Initially all GP practices in Bristol, North Somerset and South Gloucestershire were sent questionnaires to get the primary care perspective of current services, their views on what should or could change, and their perceptions of anything that could be a cause for concern as the Review progresses. 85 GPs returned questionnaires and responses were fed into the development of the service configuration options. In addition, throughout July and August 2011 the developing service configuration options and the developing commissioning documents were shared with Bristol, North Somerset and South Gloucestershire Professional Executive Committees (PECs).

We’ve met with and presented to senior representatives of the stakeholder Trusts (UHB, WAHT & NBT), senior executives within the HPA, CCG chairs, those involved in commissioning and some primary care clinicians through a round of GP practice visits. Additionally, we have met with Pathology Management at Gloucester Royal Hospital to identify ways of collaborative working to strengthen our proposition. In planning this increase in activity, we are cognisant of the need to pre-brief our senior colleagues in all three Trusts and the HPA before engaging with their existing users. This will be done by way of a written statement with regular updates. Most recently we have begun to engage with local representatives of the private healthcare sector.

Our future engagement will include other health professionals such as practice managers and professional body representatives and gradually
increase in geographical coverage out from the core areas of our business and into segments 2,3,4.

2.7 People working in secondary care
In total 41 secondary care clinicians returned questionnaires which we sent them, and these were fed into the development of the service configuration options. Secondary care staff were also invited to attend a workshop on the 10th of May 2011 to ensure their involvement, and 21 people attended the workshop. They feedback to us that clinicians would prefer us to attend their existing acute clinician meetings. As a result we attended 12 existing meetings across NBT, WAHT and UH Bristol and spoke to 141 secondary care clinicians about the proposed model for pathology services and the Commissioning Framework.

Subsequently we have held a Neuropathology workshop on the 25th of April 2012, to which three secondary care clinicians working in Neurosciences attended.

Members of staff from Pathology are working with their secondary care clinical colleagues on pathway design work in the following ways:
- Attendance at the NBT Operating Plan conference on the 14th May, 2012
- Attendance at the Acute Assessment workshop on the 1st June, 2012
- Involvement in the clinical pathway design work at UH Bristol
- The clinical pathway design work at Weston Area Healthcare Trust is still in its infancy, however, they are keen to involve pathology once the work gets underway.
- Involvement in the Transformation Programme being lead by the Healthy Futures programme particularly looking at models of care for frail older people, people with long term conditions and urgent care.

2.8 Commissioners
A strategy was created which described how people working in Commissioning would be engaged - which includes those in PCTs and Clinical Commissioning Groups. Our engagement strategy acknowledges the importance of engaging commissioners in our development. We list commissioners as part of our priority 1 segment and have assigned responsibility for engagement with these individuals at Project Director / Trust Executive level within the Severn Pathology organisation.

PCT commissioners have been represented on the Project Board by Louise Tranmer who is the Director of Commissioning Delivery for Bristol. Thom Manning, Commissioning Manager at NHS South Gloucestershire attended Project Team meetings at the beginning of the Review until March 2011. From April 2011, Andy Jennings, Head of Business Planning Development, has been leading on the development of the Commissioning Document, deputising for Louise Tranmer at Project Board meetings and attending Project Team meetings.

The BNSSG PCT Cluster Board has received regular updates on the Review and they were invited to comment on the developing service configuration options and commissioning document in October 2011.
Clinical Commissioning Groups (CCGs) will be the successor commissioning bodies to PCTs. Representatives from Bristol PCT have visited the North Somerset, South Gloucestershire and Bristol Clinical Commissioning Groups to talk about progress in the pathology review and to ask for feedback on the Pathology Commissioning Framework. Dr Mary Backhouse, CCG Chair for North Somerset represents GP commissioners on the Project Board. Regular updates for GPs are published in their local bulletins from the BNSSG PCT Cluster.

A Pathology Services and Commissioning and Governance Group has been established to ensure the commissioning and governance arrangements effectively recognise and support the requirements of patients and clinicians from across primary, secondary and tertiary care sectors.

2.9 Other providers of pathology services
- Both the Royal United Hospital (RUH) Bath NHS Trust and Gloucestershire Hospitals NHS Foundation Trust are represented on the Project Board and individual meetings have taken place with representatives of both these Trusts to determine their position in relation to the Review.
- Meetings have taken place with NHS Blood and Transplant (NHS B&T) and they have provided project assurance to the Review. Staff from NHS B&T have lead a sub group of the Haematology workstream looking at how transfusion services should be provided in the future.
- There is work happening nationally to reconfigure pathology services and therefore contact has been made with other areas to see what can be learnt from them. This has included an event with the consultancy company KPMG which were supporting NHS South East Coast. We have also engaged with pathology providers elsewhere in the United Kingdom by regular attendance at the National Pathology Forum meetings and a series of visits. A visit was made from Peter Huntley, Director of the Kent and Medway Pathology Network, and Professor Jo Martin, Consultant Histopathologist from Barts and the London NHS Trust, and Professor Adrian Newland, Professor of Haematology and Clinical Director of Pathology also from Barts and the London NHS Trust. Staff working in Cellular Pathology have visited the laboratory in Whipp Cross to learn about the work they had done to lean their processes. Visits have taken place to the Cellular Pathology laboratory in Barts and The London, Bolton and Lincolnshire to learn about their consolidation and their work on Lean. Staff at all these laboratories have been very generous with their time to ensure we learn lessons from other areas.
- Representatives from Microbiology at the HPA, NBT & WAHT have visited Plymouth and Frimley Park to investigate automation for bacteriology.
- Representatives from Microbiology have also visited Manchester and Addenbrookes in Cambridge to examine their HPA/NHS partnership arrangements to inform the partnership arrangement we will establish locally. The team also reviewed automation at Addenbrookes as this is the model the team aspire to.

2.10 Others
A newsletter has been produced at key stages in the review and distributed to all stakeholders who have had any engagement in the review, as well as Trust communications leads to put in their staff newsletters. People who receive the newsletter are encouraged to share it with theirs teams and colleagues. The
newsletter reports on the progress of the review and keeps stakeholders informed of
the next steps. In total fourteen newsletters have been produced and have been well
received. NBT plan to continue to produce newsletters during the implementation
phase of the project.

A website has been established for the review and contains key documents and
details of the review for anyone to access. There are contact details on the website
for people to get in touch if they would like further information. A public forum was
set up on the website where people could post comments that were responded to.
However, this was little used so it has been removed.