Evaluate…

Understand your current ESR usage to identify areas for achieving improved financial controls using ESR.

1. Do I understanding the ESR functionality available to support effective financial controls in ESR?
2. Does our current e-learning platform offer remote access from mobile devices?
3. When did we last conduct a training needs analysis?
4. Do I know how much we spend on delivering training?
5. Do I know how much we spend on procuring or producing our own e-learning programmes, and are these needed when national courses are available?
6. How easily can we report on our workforce related KPIs i.e. vacancy, sickness, turnover and compliance?
7. Do we ensure that all positions in ESR are maintained and synchronised with our finance system?
8. How can I reduce bank and agency spend by streamlining back office processes to reduce vacancy rates and absence?

Consider…

Understanding the opportunities for financial efficiencies available to you and your organisation, when considering the wider NHS landscape will help to ensure you deliver a cost efficient service both for today and for the future.

1. Do we comply with current national streamlining advice?
2. How do we ensure we are maximising the ESR functionality to make us a model employer in the wider NHS landscape?
3. Is our workforce plan in line with Sustainability and Transformation Plan activity and expectations or national guidance?

To assist you in formulating your next steps, we recommend that you contact your NHS ESR Account Manager or Functional Advisor who can undertake your **Annual ESR Assessment** with you. This will give you, your leadership teams and operational leads a detailed ESR Annual Statement, which provides an in depth analysis of how you are utilising ESR, including usage statistics across the full solution; and what is the potential for expanding your use of ESR functionality to support you in meeting your organisational needs.

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Take Action…

To help you formulate a clear plan of action that supports your learning and development strategy and planning we recommend you initiate the following;

Arrange a meeting with your Head of Finance

Key questions:

1. Does your ESR hierarchy match your finance system hierarchy?
2. Do you know sickness absence and back fill costs for the organisation – is sickness absence accurately recorded and reported?
3. Have we fully explored and evaluated the costings functionality in ESR Learning Administration?
4. How much do we pay for third party Learning Management Systems? Is this required considering the capability in ESR?
5. How much do we spend on third party or in house e-Learning content provision? Is this required considering the national learning content available via ESR?
6. Do we have manual workforce data processing that can be replaced by an ESR Interface?
7. Are we handling and delivering payslips to our employees?
8. How much time is spent by the Finance team preparing and processing cross charge and error correcting journals as a result of inaccuracies between ESR and our finance ledgers?

Arrange a meeting with your Assistant HR Director/Head of Workforce/ESR Lead/Finance Lead

Key questions:

1. What is our expectation in terms of reporting on budgeted FTE?
2. How does ESR fit into our workforce strategy?
3. Are we getting the maximum benefits from ESR?
4. How can we increase our use of ESR to gain further efficiencies?
5. Have we looked at how ESR can support our cost improvement plans with back office processes?
6. Are we developing our utilisation of ESR to benefit our workforce?

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