The National CLEAR Programme
Mental Health Phase 2022/23

Innovation and training in mental health redesign in NHS North West and South West

Part 2: Invitation to submit an Expression of Interest

November 2021

Contents

If you have any questions about what is outlined in this proposal or would like to discuss your specific requirements in more detail, please contact a member of the CLEAR team by emailing clear.team@hee.nhs.uk

Purpose of this document

Welcome to the National CLEAR Programme

Welcome to the National CLEAR Programme and thank you for your interest in transforming the mental health workforce. Health Education England is offering support to local projects that help to develop the mental health workforce in your mental health trusts. This is a unique opportunity for organisations across the North West and South West regions.

Please see Part 1 of the proposal to understand what CLEAR is and how the programme can support mental health services in your region. This is a chance to accelerate initiatives, develop your workforce and improve outcomes for patients.

This document explains how to submit an expression of interest for these exciting projects, what information will be required from members of your team as part of your expression of interest and includes frequently asked questions (FAQs) for any queries that you may have about the process and the CLEAR programme.

The CLEAR team will be holding webinars on the following dates and will be happy to answer your questions:

- North West 2nd December 2021
- South West 8th December 2021

If you are unable to make the above dates, please contact a member of the clear team by emailing clear.team@hee.nhs.uk

For your organisation to be considered for the National CLEAR Programme for Mental Health, you will need to complete an online expression of interest by **Monday 31 January 2022**.

If you have any questions about this document or the proposal, please contact clear.team@hee.nhs.uk

Who is this for?

We are inviting mental health trusts within the North West and South West regions to submit an expression of interest to take part in this exciting series of projects. This is a competitive process, places are limited and we want to set these projects up to be a success at your site.

The projects are performed synchronously to ensure shared learning and education between project sites and across systems. This means that the timelines for site preparation and on-the-ground delivery are fixed to ensure the successful choreography of all project sites together. Please review the timelines outlined below.

A successful expression of interest will require input from a fully engaged:
• Executive Sponsor for the project
• Clinical Lead for the project
• Information Governance representative from your organisation
• Business Intelligence representative from your organisation

The requirements for each role are outlined in the document. A successful EOI will need the above representatives to have completed relevant agreements, these are found in the corresponding sections further on in this document.

Dates and timescales

Dates	Action
December 2021	Expression of interest application opens, and a series of webinars are offered to provide information and an opportunity for questions for each region. (NW 2/12/21 and SW 8/12/21)
January 2022	Application closes on 31/01/2022
February	Short-listed sites and launch dates agreed with sites
March	Project launch at short-listed sites. Sites have approximately 6 months to complete data sharing agreements, perform data extraction, recruit participants and prepare for on-the-ground delivery.
August	Successful sites that have completed milestones will commence the education, training and project delivery.
March 2023	Completion of projects and consideration of findings.

4

What do I need to know about CLEAR?

Role requirements for project success

Someone from your organisation, whether that be an executive or clinician, is looking at submitting an expression of interest for a CLEAR mental health project within your organisation. More information about what a CLEAR project entails and the opportunity are outlined in '*Innovation and training in mental health redesign in NHS North West and South West – Part 1*'. To understand the impact of such a project please read '*The value of CLEAR – A formative health economic evaluation'.*

To ensure the utmost success of outcomes and clinical and executive buy in, the project requires certain elements and an understanding from each of the following roles/teams within your organisation. Please ensure you and other relevant colleagues take the time to understand the requirement from project sites ahead of completing an expression of interest for CLEAR Mental Health.

As a trust CEO/COO/MD/HRD

The CLEAR programme builds local capability whilst performing workforce and service redesign projects with improving patient care at their heart. This series of projects will be working with community mental health teams to consider Adult Severe Mental Illnesses (SMI) Community Care (also known as Community Mental Health Teams). These projects are diagnostic and bring together local clinical insight with patient activity data to outline potential new models of care and workforce.

Each project site requires an Executive Sponsor who champions the project within the trust. For the programme to be a success at your site, we would require the executive sponsor's active support in:
- Identifying the correct individuals within your trust to engage with the project, including the leads for the clinical area, information governance and business intelligence;
- Prioritising this work to ensure that it achieves timelines;
- Aligning the CLEAR project goals and objectives with organisational strategy;
- Communication of this work to the Executive Board to ensure its impact; and
- Approving the backfill and protected time for participants to perform the education and delivery of the project.

If you are the agreed Executive Sponsor for the project, you will need to complete Part A of the EOI using the link below. This will make up 1 of 4 parts to the EOI.

EOI Part A – Executive sponsor to complete

What do I need to know about CLEAR?

As a department Divisional Director/Matron/Manager

The CLEAR programme builds local capability whilst performing workforce and service redesign projects with improving patient care at their heart. For information about the CLEAR programme in mental health services, please see Part 1 of this proposal invitation and to understand the impact of such a project please read 'The value of CLEAR – A formative health economic evaluation'.

This series of projects will be working with community mental health teams to consider Adult Severe Mental Illnesses (SMI) Community Care (also known as Community Mental Health Teams). These projects are diagnostic and bring together local clinical insight with patient activity data to outline potential new models of care and workforce.

Each project site requires a clinical sponsor who champions the project within the chosen area. This role requires a time commitment of 8 hours per week for the duration of the on-the-ground delivery. There are often individuals who are important to the project but who do not have this available time to contribute. The programme considers these individuals to be key stakeholders who are kept in touch with the progress of the project without the time commitment.

For the programme to be a success at your site, we require the clinical lead for your chosen area to actively support in:
• Identifying a senior clinician to become the clinical sponsor of the project;
• Outlining the key stakeholders for the project;
• Supporting the recruitment of local clinicians to become CLEAR associates for the duration of the on-the-ground delivery of the project; and
• Promoting the project within their clinical area and trust.

If you are the agreed Clinical Lead for the project you will need to complete Part B of the EOI using the link below. This will make up 1 of 4 parts to the EOI.

EOI Part B – Lead for clinical area to complete

What do I need to know about CLEAR?

As a trust IG Lead/Data Protection Officer/Caldicot Guardian

CLEAR projects will use data from your organisation that is:
• collected directly from your workforce
• shared from your information assets and systems, including patient administration systems or equivalents.

Individuals contained in the data shared by the trust are not identified: no names, NHS numbers, dates of birth, unstructured data, or places of residence are shared.

Individuals are not anonymous as local unique identifiers are required to map patient journeys: as such, the data is personal.

Due to the extent by which 33n determine the purpose, scope and nature of processing, a controller-to-controller sharing agreement is best. This ensures the participating trust and 33n can meet their data protection responsibilities and ensure data subjects are able to exercise their individual rights.

33n does not share data that has been shared from trust information assets or systems with any other organisation. 33n has completed the NHS Digital DSP Toolkit and is Cyber Essentials Plus certified.

For the programme to be a success at your site, we would require active support from all key information governance roles to:

• Review and agree the information governance documentation in line with project timelines.

If you are the agreed IG Lead for the project, you will need to complete Part C of the EOI using the link below. This will make up 1 of 4 parts to the EOI.

EOI Part C – Lead for Information Governance to complete

More detail on the CLEAR privacy notices for both patients and the workforce can be found on the CLEAR website.

What do I need to know about CLEAR?

As a trust lead for business intelligence (BI/IT Lead/Chief Information Officer)

Once information governance agreements have been completed, the projects require an extraction of data that reflects patient activity and workforce at your organisation. The patient activity data that is required reflects the Mental Health Service Data Set (MHSDS) over a period of 3 consecutive years to obtain a historical view of how the activity and flow has changed over time. Once the data has been extracted, we request that it is transferred via a secure upload to 33n's London-based servers.

We request workforce data from a combination of electronic staff record (ESR) and finance data. This describes the workforce that delivers care by whole time equivalent (WTE) per role and outlines the monthly spend for substantive, bank and agency requirement. The workforce data provides an important baseline understanding of the workforce available within the organisation to deliver care for patients.

For the programme to be a success at your site, we would require the lead for BI's active support in:
• Identifying a designated contact within the BI team to take responsibility for scheduling and prioritising the planned work, receiving the data specification, extracting and sending the financial, workforce and patient activity data to 33n by the planned dates.

If you are the agreed BI Lead for the project you will need to complete Part D of the EOI using the link below. This will make up 1 of 4 parts to the EOI.

EOI Part D – Lead for Business Intelligence to complete

What do I need to know about CLEAR?

As a communications manager

Your NHS organisation is thinking about taking part in the National CLEAR Programme for Mental Health. Clinicians from your organisation will be seconded (for two and a half days a week) as CLEAR Associates and they will be assigned to live projects within your organisation in service areas that may benefit from investigating new ways of working and models of care. The CLEAR Associates will be guided through a 26-week staged education process where they will learn the fundamentals of big data analysis and clinical engagement which will then lead to innovations in how patient care is delivered. The recommendations from this work will be presented back to your senior leadership.

Throughout the CLEAR project, the CLEAR communications team may promote findings, testimonials, and experiences through digital channels throughout the project duration as well as promoting to our national sponsors, Health Education England. We encourage you to promote this content and input where appropriate.

We envisage there to be comms activity during the start of the project for internal stakeholders, mid-project findings and towards the end of the project. A meeting with a communications representative of your organisation with the CLEAR Communications Manager will need to take place prior to project start date. Timelines will be confirmed once project onboarding has taken place.

As the Quality Improvement/Innovation/Transformation Lead

At CLEAR we recognise that quality improvement, innovation and transformation are interlinked teams that drive positive change for organisations. We appreciate that change often requires the time and space for like-minded people to work together to solve the challenges we face.

CLEAR projects employ the best of research and QI methodology to deliver a pragmatic but systematic qualitative and quantitative review of big data to understand the key challenges faced in the departments we work in. Through this understanding, we want to work with you and your teams to design and develop realistic and sustainable models of care and workforce.

One of our key priorities when working with organisations is identifying key stakeholders such as yourselves, to help us understand the organisational context, strategy and goals.

For the programme to be a success at your site, we will need your active support at key points of the project to ensure that the CLEAR project aligns with change that is implementable. This will involve:
- Identifying an appropriate individual within your QI/Innovation/Transformation team to liaise with regarding this project;
- Supporting the presentation of findings from this project; and
- Sharing your experience of implementation with the project team to help shape the implementation approach.

9

What do I need to know about CLEAR?

As a prospective CLEAR Participant

CLEAR offers motivated individuals the opportunity to improve the systems they work in through evidence-based, innovative solutions. By taking part in a CLEAR project, you will be enrolled onto a work-based learning initiative designed to teach you all the skills to perform effective, innovative workforce redesign and new models of care. You will be seconded for approximately 2.5 days a week as CLEAR Associates to the National CLEAR Faculty.

Your learning time is protected, with CLEAR providing you the chance to make a high-profile impact on health and care at both a local and system level. Taking part in CLEAR will contribute to your portfolio career, providing you with new tools and techniques allowing you to apply your learnings to future transformation projects. We will monitor your personal development and experience throughout your project to ensure you are getting the most from the programme.

Below you will find some key information about enrolling on to the CLEAR Programme. If you have any other specific questions, please contact clear.team@hee.nhs.uk

What skills do I need?
The most important element you should bring to the projects is your understanding of clinical processes and ways of working and the nuances of these in different areas, departments and systems. Individuals applying need to have a solid IT skills as much of the learning and work is online using Word, PowerPoint, Excel and Teams and there are new systems you will have to learn how to use with guidance form the Faculty.

Good communication skills are required, including verbal and written, as elements of the work will require hosting interviews and conversations with frontline workforce and important email communications to stakeholders and others in your team. Good basic presentation skills are also required with regular internal and external presentations of findings throughout the projects. Due to the hybrid nature of the programme, with distance learning and work, there is a need for individuals to be well organised and to take initiative.

What skills will I learn?
CLEAR projects provide excellent formal and experiential learning in various key areas for clinical professional development. At entry level to the programme, the training will focus on the basics of the CLEAR methodology and its associated skills. These include, project management, advanced communication skills and stakeholder management, leadership, qualitative and quantitative data analysis, innovation techniques, formal report writing and presentation skills, risk management and team working. All of these areas and more will be essential to develop and use within a CLEAR project. Moreover, a CLEAR project will give you the platform to practice these skills in real settings, including presentations back to senior leadership and contributing to national stakeholder briefings.

What do I need to know about CLEAR?

As a prospective CLEAR Participant

What work will I do?

The work is exciting and varied; no two weeks in a CLEAR project will be the same. CLEAR is divided into four distinct phases. In phase 1 the focus is on qualitative data gathering and analysis. This phase will see you learn about effective communication and lead interviews and meetings, followed by working as a team to code and theme the findings. In phase 2 we will investigate the quantitative data of your organisation, through bespoke data visualisation dashboards and analysing these outputs, working as a team to consider how best to examine the data and the insights from it. Phase 3 sees us bringing together the findings of the first two stages by innovating potential solutions to the challenges identified. You will be working in your teams to use innovative tools to look at modelling your workforce. In phase 4, you create your final recommendations and document all your findings in a report and presentation before presenting it to the executive board at your organisation.

Take a look at our week-by-week infographic outlining the course content in more detail.

What is the time commitment?

As a key member of the team, you will be allocated to CLEAR work for 19 hours a week. This reflects two and half days, with two full days added to CLEAR and a half day of flexible working time. CLEAR projects ask clinicians to challenge existing ways of thinking while learning and developing lots of new skills while continuing your clinical role, which means the work can be quite intense. We suggest that if you are concurrently undertaking any other education programmes or completing examinations that you consider your available time carefully.

What will I get out of a CLEAR project?

At the end of the project, you will have completed the introductory level of the CLEAR programme and gained many of the skills and experiences detailed above. You will have a full data and clinically-led transformation project under your belt and a report to evidence your work for future applications. You will also be given the opportunity to apply for continuation within the CLEAR programme and continue to work as part of the faculty within projects and build a portfolio career.

What do previous participants think?

Claire Brewster, a Frailty Nurse who took part in a CLEAR Project, said "I have learnt many new skills related to CLEAR such as being able to visualise and interpret data and how to apply it to clinical settings to explain the challenges we face. The new skills I have learnt are transferable to my clinical work including the invaluable communication skills and increased knowledge of strategic issues within the NHS."

Read more about Claire's experience and ongoing work with CLEAR.

Submitting your expression of interest

For your organisation to be considered for the National CLEAR Programme for Mental Health: *Innovation and training in mental health redesign in NHS North West and South West*, your organisation will need to complete an online expression of interest form by **Monday 31 January 2022.**

The expression of interest is made up of 4 short surveys which need to be completed by the agreed project Executive Sponsor, Clinical Lead, IG Lead and BI Lead. Each form takes less than 5 minutes to complete online. A delegate may complete this form with the express knowledge of the lead.

EOI Part A – Executive sponsor to complete

EOI Part B – Lead for clinical area to complete

EOI Part C – Lead for Information Governance to complete

EOI Part D – Lead for Business Intelligence to complete

Please note, in order to process your application, we will need each of the four forms to be completed by Monday 31 January 2022.

What happens next?

The EOI applications will be reviewed and shortlisted by **9th February 2022**.

Site engagements will commence **14th February 2022**.

If successful, you will be asked to identify three potential dates and times for the CLEAR team to meet and discuss next steps in the week of the 14th and 21st February 2022. The objective of this meeting is to initiate local engagement, ensure initial understanding of the CLEAR Programme and introduce the work that is needed next. It would also be helpful if you could bring your ideas for the project so we can define the type of project and outcomes required from the CLEAR project.

Following the initial meeting, a series of subject specific meetings will be organised, particularly in relation to agreeing information governance, writing a scope document, arranging stakeholder interviews, arranging data extraction and visualisation requirements.

If you have any questions about the above or would like to discuss your specific requirements, please contact a member of the CLEAR team by emailing clear.team@hee.nhs.uk

Frequently Asked Questions
Mental Health Phase 2022/23

Innovation and training in mental health redesign in NHS North West and South West

Frequently asked questions (FAQs)

About the CLEAR Programme

How is CLEAR commissioned?
- The CLEAR programme for Mental Health is commissioned by Health Education England. The programme provides the direction, structure and support to perform these projects, including the education of participants and supervision of projects. To find out more about the HEE relationship with CLEAR, please visit the HEE website.
- Local project sites provide the backfill for their participants to take part in the CLEAR programme.

What is the selection process for the project site?
- There are two places per region for CLEAR Mental Health and so there is a competitive process to ensure that this investment is made into the sites that will engage most effectively with the programme.
- Interested sites are asked to submit an expression of interest (EOI) that requires engagement from key members of their teams – the executive sponsor and leads for information governance, business intelligence and the clinical area for the project. The EOIs are shortlisted and the onboarding process will be commenced for all sites that achieve the shortlist criteria.
- The onboarding process, which includes the recruitment of participants, data sharing agreements, data extraction and process mapping, is performed within a 6-month period to ensure that the sites are lined up to commence the education programme and on-the-ground delivery together.
- As there are only two places per region, available places will be offered to those sites that have successfully completed their onboarding checklist in a timely fashion.
- The CLEAR team will be available to help guide your site through the process at every step.

How is CLEAR different to Quality Improvement (QI) or Research?
- Both QI and CLEAR aim to improve safety, clinical effectiveness and patient experience, however CLEAR focuses more on optimising systems and workforce than direct clinical interventions.
- CLEAR is an in-depth mixed method workforce redesign programme, that functions to understand service issues and develop data-driven new models of care.
- CLEAR brings together the best of applied research, QI, data analytics, action research and consultancy to develop bespoke solutions grounded in the data.
- Implementation science could support implementation of CLEAR findings.

What is the impact of the CLEAR programme?
- To read more about the impact of the CLEAR programme to date, you can read "The value of CLEAR – A formative health economic evaluation"

Where can I find out more information about the CLEAR programme?
- To find out more about the CLEAR programme, please visit our website clearprogramme.org.uk

Frequently asked questions (FAQs)

About what it means for my organisation

What does my organisation have to commit?
- For these projects to be a success, your organisation will need to commit time, support and leadership. This will include proactively supporting the set-up of the project through facilitating data sharing agreements, data extraction and project coping, and identifying the right people to invest in as part of the project team to deliver the project.
- Building the capability within your organisation to perform this type of work is a positive investment for the future.

How much does my organisation have to pay?
- Local project sites provide the backfill for their participants to take part in the CLEAR programme. This will include:
  - 8 hours per week (approx. 1 day per week) for the Clinical Sponsor (x1)
  - 19 hours per week (approx. 2.5 days per week) for the CLEAR Participants (x3)
- This is for a duration of 6 months.

Where can I get support with backfill for my participants?
- Regional and system teams may be able to support with backfill on a case-by-case basis. For further questions, contact the clear.team@hee.nhs.uk

Can there be more/less participants on a project?
- The project requires 3 CLEAR Associates and 1 Clinical Sponsor for the duration. The programme involves intense education alongside a high-paced workforce redesign project which involves extensive engagement with frontline clinicians. Our experience of performing these projects has shown that the above structure provides the most effective and efficient approach, whilst also providing resilience if required.
- The investment in individuals and the team will set up a strong foundation for further work in other areas at your organisation. It is important that the participants have dedicated time to undertake the education and perform this work as the quality of the outputs are closely correlated with these factors.

Do CLEAR participants have to be clinicians?
Clinical leadership is a fundamental tenant of these projects, giving the space and time for clinicians to combine their experience with a data-driven approach to system redesign. It is important that this clinical experience remains at the heart of the CLEAR team at your project site.

Can CLEAR participants be committed for less than 19 hours per week each?
- Undertaking the CLEAR programme involves significant post-graduate education whilst also putting that education into practice via a live project. This commitment requires an investment of time and effort that will be well rewarded by the personal development and project outcomes.
- We want to provide the environment in which individuals can thrive and so require that each participant has this time ringfenced.

Frequently asked questions (FAQs)

About the CLEAR Projects

How does CLEAR comply with latest IG legislation and GDPR?
- 33n are data controllers for CLEAR projects and have completed the NHS Digital DSP Toolkit assessment and are Cyber Essentials Plus certified.
- We have a dedicated information governance team that perform, and share with the participating organisation, data processing impact assessments that document the purpose, scope and nature of processing and give due consideration to compliance with data protection legislation and protecting individuals' rights and freedoms.
- The CLEAR website contains privacy notices for both patients, that may be included in the data shared by participating organisations and for members of the participating organisation's workforce. These staff may be participating in interviews or workshops designed to gather complementary data used to help contextualise and validate insights from data shared from trust's information assets and systems.
- We take a collaborative approach to information governance to ensure that local concerns, risks or constraints are accurately reflected in our data sharing documents and in our processing of the data.

What data does CLEAR require to perform these projects?
- We consider the data to perform these projects to be a) qualitative – referring to rich experiential data gathered through techniques such as interviews and focus groups with members of the workforce, and b) quantitative – referring to the numerical data that describes patient and workforce activity.
- The quantitative patient activity data is de-identified to understand the requirement for care and high-level workforce data to understand the current workforce available.
- No new patient data is collected during a CLEAR project.
- The projects require 3 consecutive years of data to understand how trends have changed over time.

How are CLEAR insights and findings shared with interested parties?
- Progress on the CLEAR projects in Mental Health will be shared with the sponsors of the programme, Health Education England.
- CLEAR projects require the involvement of frontline staff throughout. Materials related to the project will be presented within the department and to the executive board.
- Stakeholders based outside the trust will only have insights and findings shared after permission has been granted by the executive sponsor, or their delegate.
- With permission, findings from the projects may be shared with the CLEAR Mental Health Steering Group, Health Education England and will be published on the CLEAR website.
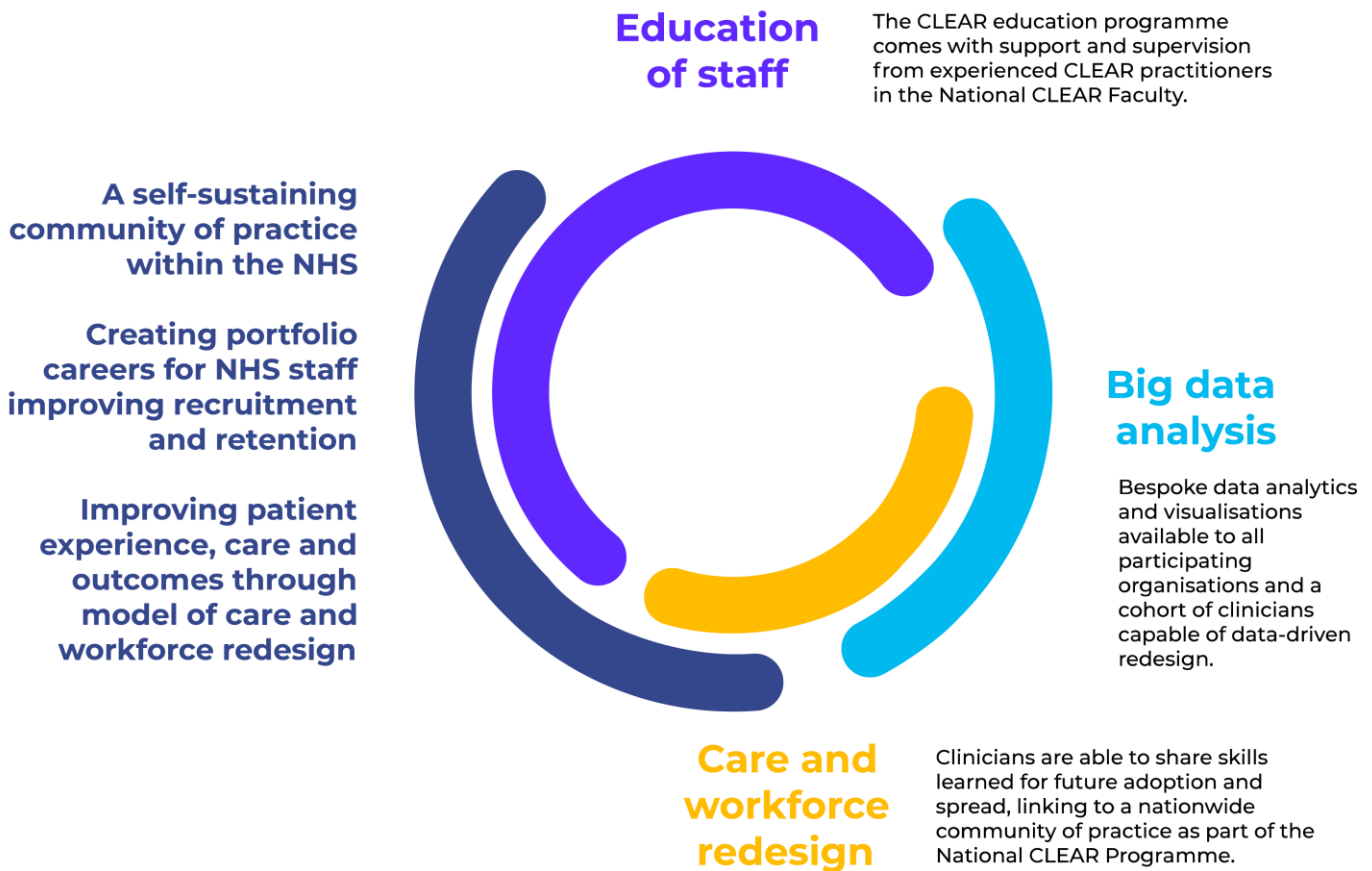
Frequently asked questions (FAQs)

About the CLEAR Projects

What are the outputs of a CLEAR project?

CLEAR outputs include a detailed case study, presentation of findings for senior leadership, department level presentation and an extensive findings report all while building an intrinsic capability within the NHS.

The CLEAR projects are diagnostic in that the project combines an in-depth analysis of the data (both qualitative and quantitative) led by your organisation's clinicians. The experienced CLEAR Faculty then work with the CLEAR Associates to innovate and refine proposed recommendations for change that are financially and operationally viable. These recommendations will include proposed new models of care and workforce and the impact of these.

Education of staff

The CLEAR education programme comes with support and supervision from experienced CLEAR practitioners in the National CLEAR Faculty.

A self-sustaining community of practice within the NHS

Creating portfolio careers for NHS staff improving recruitment and retention

Improving patient experience, care and outcomes through model of care and workforce redesign

Big data analysis

Bespoke data analytics and visualisations available to all participating organisations and a cohort of clinicians capable of data-driven redesign.

Care and workforce redesign

Clinicians are able to share skills learned for future adoption and spread, linking to a nationwide community of practice as part of the National CLEAR Programme.

The EOI requires a project in "Adult Severe Mental Illness Community Care" – what does this include?

A project in Adult Severe Mental Illness Community Care is a project involving one of the Community Mental Health Teams within your trust. If you are unsure of whether your project falls into this category, please contact clear.team@hee.nhs.uk.

clearprogramme.org.uk

clear.team@hee.nhs.uk

@clear4care