Infusion device project
Step-by-step guide to using the solutions toolkit
Infusion device project – products developed:

- Decision-making checklist
- Two baseline assessments
- Usability questionnaire
- Centralisation advice (business case scoping)
- E-learning (in development)
- Economic appraisal indicator (spreadsheet)
- Patient information leaflet
- PaSA-hosted website
- Six pilot sites willing to share their experiences with others.
Step-by-step guide to using the solutions toolkit

This guide suggests a step-by-step approach to using the solutions toolkit. Each step assists Trusts to focus on specific issues relating to purchasing, managing and using infusion devices. As you progress through the steps you will build a solid foundation that improves purchasing decision making, establishes standardisation and scopes the potential for developing a centralised equipment facility.

Each step sets out the:

- action required and which solution to use;
- timescale guide for the completion of each step;
- key people likely to be involved;
- desired outcome for the step.

It is acknowledged that Trusts may have already commenced work and begun to develop their own purchasing processes and systems. Both this guide and the solutions toolkit can be used as checking aids to support and confirm local developments in this area.
Steps 1 & 2
Carry out Baseline Assessments 1 & 2

Step 3
Review baseline assessment data and establish action plan

Step 4
Commence and develop tender process

Step 5
Test and evaluate usability of selected infusion devices

Step 6
Agree and award tender

Step 7
Develop centralisation facilities

Step 8
Measure progress. reassess BA1 and BA2
<table>
<thead>
<tr>
<th>Steps</th>
<th>Action</th>
<th>Timescale</th>
<th>Key people</th>
<th>Guidance and/or resource</th>
<th>Desired outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Carry out baseline assessment 1 (checklist)</td>
<td>4 weeks</td>
<td>Trust lead Clinical staff Audit Dept Risk Management Supplies manager EBME manager Finance lead</td>
<td>Decision checklist – baseline assessment 1 Available on website</td>
<td>To establish that the purchasing process includes key decision makers and accesses key information, with the aim of promoting standardisation</td>
</tr>
<tr>
<td>2</td>
<td>Carry out baseline assessment 2 (infusion device usage audit) <em>Carry out concurrently with step 1 above</em></td>
<td>4 weeks</td>
<td>Trust lead Clinical staff Audit Dept Risk Management Supplies manager EBME manager Finance lead</td>
<td>Infusion device usage audit Available on website</td>
<td>Establish the numbers, range and cost of infusion device stock, along with utilisation rate of stock etc. Establish the number of incidents involving infusion device use Highlight inefficiencies in maintenance systems Establish the scope of work required to be carried out, eg the need for standardisation and centralisation</td>
</tr>
<tr>
<td>3</td>
<td>Review the baseline assessment data</td>
<td>2 weeks</td>
<td>Designated Purchasing Committee (DPC)</td>
<td>Sample action plans available on website toolkit as guidance.</td>
<td>Explore the scope for standardisation and centralisation Business case for centralisation Develop action plan</td>
</tr>
<tr>
<td>4</td>
<td>Produce a tender Develop an agreed infusion device specification as ‘Trust standard’</td>
<td></td>
<td>DPC</td>
<td>Tender development guidance from the Purchasing and Supply Agency (PaSA) available on website</td>
<td>Trust-focused device specification Tender to supply standardised stock</td>
</tr>
<tr>
<td>5</td>
<td>Evaluate infusion devices selected/short listed as part of tender process. This should be completed as part of the tender development process</td>
<td>Up to 12 weeks</td>
<td>DPC Clinical staff Manufacturers</td>
<td>Usability evaluation questionnaire (website hyper link to BIME)</td>
<td>Inform DPC decision making to appoint successful tender Provide feedback to other purchasers and manufacturers via BIME website (to influence design and user issues)</td>
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<td>6</td>
<td>Award tender to meet the needs of the organisation</td>
<td>Tendering guidance 20+ weeks – depending on spend</td>
<td>DPC Manufacturers</td>
<td>PaSA tender document for infusion devices available on website</td>
<td>Standardised stocks of infusion devices</td>
</tr>
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</table>
| 7     | Scope/develop centralisation facilities  
Consideration should be given to include this aspect in any deal arrived at through the tendering process or developed independently by the organisation | Variable – depending on the available existing resource. 26 weeks (minimum) | DPC Stakeholders  
Finance  
EBME  
Clinical Engineering  
Supplies  
Clinicians | 'How to' document, example business case available on website  
Baseline assessment 2 data will assist in identifying the scope of the work required | Produce a business case for equipment centralisation  
To improve quality and efficiency as well as reduce costs |
| 8     | Baseline assessments steps 1 and 2 reassessed | 6-monthly intervals | DPC Trust medical devices lead | Assessment documentation as for steps 1 and 2 | To measure progress |
We recognise that healthcare will always involve risks. But that these risks can be reduced by analysing and tackling the root causes of patient safety incidents. We are working with NHS staff and organisations to promote an open and fair culture, and to encourage staff to inform their local organisations and the NPSA when things have gone wrong. In this way, we can build a better picture of the patient safety issues that need to be addressed.