

Ref. No: 2605
Date: 04/06/26
Subject: Staff Appraisal & Mandatory Training Reporting Infrastructure

REQUEST & RESPONSE

If your Trust hasn't implemented any platform outside of ESR / LMS (and therefore answers 'no' to question 2 around platform implementation), then all subsequent questions are not applicable.

This is a request under the Freedom of Information Act 2000. Please provide the following information regarding the Trust's internal workforce data reporting and accessibility frameworks, in relation to appraisal and training compliance data and reports.

For the purposes of this request, "PID-level" refers strictly to Person-Identifiable Data (i.e., data broken down to individual staff member names or staff work-based email addresses) rather than aggregated department-level figures.

Please complete the attached excel template with your answers for the below questions.

1. Trust status

a) Please state your Trusts' full name (i.e. no acronyms)

Mersey and West Lancashire Teaching Hospitals NHS Trust

b) Please state whether you are an:

- Acute Foundation Trust
- **Acute Non-Foundation Trust**
- Mental Health Foundation Trust
- Mental Health Non-Foundation Trust
- Community Foundation Trust
- Community Non-Foundation Trust
- Integrated Acute & Community Trust
- Specialist Trust
- Care Trust

2. Accessibility of Performance Data

a) Does the Trust make individual PID-level staff appraisal and mandatory training compliance data directly accessible to staff via local intranet or accessible platforms (such as Microsoft SharePoint, local intranet dashboards, PowerBI hubs, Tableau hubs, or shared drives)? **No**

Note: Please exclude any access routed directly through the national Electronic Staff Record (ESR) platform or similar.

If yes, please provide:

b) The month and year the appraisal and training report(s) were implemented on the accessible platform in the format of mmm-yyyy. If the month is unknown, please still provide the year.

c) The generic name of the platform you use (such as Microsoft SharePoint, local intranet, PowerBI hubs, Tableau hubs, or shared drives)

3. Access Permissions & Restriction Protocols

If the reports/dashboards identified in Question 1 exist, please confirm how access to this person-identifiable compliance data is governed:

- a) Is the information visible to all corporate network users uniformly (yes/no)?
- b) Is the information visible to all network users uniformly (i.e. all staff, irrespective of role) (yes/no)?
- c) Is access restricted based on specific user profile permissions? (yes/no)
 - If restricted, please state the criteria used (e.g., restricted by individual Username, restricted exclusively to users with Line Manager/ Supervisor status, or restricted by Departmental/Directorate boundaries).
- d) Other – If 'other', please provide a brief description of how this is governed.

4. Recorded KPI Impact Data

If the reports/dashboards identified in Question 1 exist, to understand the operational impact of making these reports available, please provide the Trust's monthly KPI compliance rates to two decimal places (0.00%) for

a) staff appraisals, and
b) mandatory training (either 'core' training or all training required – whichever is easier to supply)

- The end-of-financial-year compliance (%) figures for the March before the platform's implementation.

- The end-of-financial-year compliance (%) figures for the subsequent three Marches after platform implementation (if implementation is less than three complete financial years, please provide the end of financial year March figures up to March 2026).