



Notice distress, listen carefully, respond helpfully

## Business case guide for SAGE & THYME® training

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### Introduction

This document is intended to provide guidance on the information potential customers may wish to include in a business case, to gain the necessary organisational approval and/or funding to run SAGE & THYME Foundation Level/Online training in their organisation.

Some organisations have their own business case template that must be used. However, the information suggested below should assist the completion of such templates.

It is recommended that the '**basic guide**' to SAGE & THYME is read before reading this document.

### 1. Building the case

#### a) General evidence:

Mention the evidence regarding the need for staff to have good communication skills. For example:

- Good communication influences patients' emotional health, symptom resolution, function and physiological measures (blood pressure), and decreases reported pain and drug usage.<sup>1</sup>
- Insufficient training in communication is a major factor contributing to stress, lack of job satisfaction and emotional burnout in healthcare professionals.<sup>2,3</sup>

#### b) Why SAGE & THYME training?

- The unique selling point for the SAGE & THYME is that whilst most courses with evidence that they change communication skills are run for 3-12 people over at least 20 hours, the SAGE & THYME Foundation Level workshop teaches evidence-based core communication skills to a multi-disciplinary group of 30 people in only 3 hours, and the SAGE & THYME Online workshop teaches a group of 20 people in just under 3 hours.
- The evidence behind the SAGE & THYME model is described in '**The Royal Marsden Manual of Clinical Nursing Procedures**' (2015) and the 'Oxford Textbook of Communication in Oncology and Palliative Care' (2017).

<sup>1</sup> Stewart MA (1996). Effective physician-patient communication and health outcomes: a review. Canadian Medical Association Journal; 152: 1423-33.

<sup>2</sup> Fallowfield L, Jenkins V (1999). Effective Communication Skills are the key to good cancer care. European Journal of Cancer; 35 (11): 1592-1597.

<sup>3</sup> Taylor C, Graham J, Potts H, Richards M, Ramirez A (2005). Changes in mental health of UK hospital consultants since the mid-1990s. Lancet; 366 (9487): 742-444.

c) **Relevance of SAGE & THYME training to healthcare staff and others:**

- **NURSES AND MIDWIVES:** the knowledge and skills taught apply to sections 2 and 3 of the Nursing and Midwifery Council publication, 'The Code: Professional standards of practice and behaviour for nurses and midwives' (2015). SAGE & THYME is also included in the **Royal Marsden Manual of Clinical Nursing Procedures** (2015).
- **DOCTORS:** the knowledge and skills taught apply to domain 3 of the 'GMC: Good Medical Practice' (2013).
- **HEALTH AND CARE PROFESSIONS:** the knowledge and skills taught apply to section 7 of the 'Health and Care Professions Council: Standards of conduct, performance and ethics' (2012).
- **MANAGERIAL and ADMINISTRATIVE staff:** the skills of listening and responding helpfully are the foundation of work in the NHS.
- **VOLUNTEERS, STUDENTS and others:** these people often have more time to spend with people who are upset and therefore need to know how to confidently structure conversations with them.

d) **Local and national strategies:**

Mention the local and national strategies and guidelines that require communication skills training (e.g. local needs assessments). This could include:

- Your organisation's strategy and values.
- The SAGE & THYME model addresses four of the '6Cs' key staff skills promoted by NHS England: care, compassion, competence, and communication.
- SAGE & THYME is used as a case study in Macmillan Cancer Support's report on '**How we can support and empower NHS staff to deliver a good experience of care to patients**'
- NHS guidance on communication with patients (such as: <https://www.england.nhs.uk/coronavirus/publication/good-communication-with-patients/>)
- It is highlighted as an example of best practice in a number of NHS Trust **CQC reports** including Salford Royal NHS Foundation Trust (rated outstanding), Guy's and St Thomas' NHS Foundation Trust (rated good) and Manchester University NHS Foundation Trust (rated good).

e) **Need for change:**

Explain the current situation in your organisation with regards to communication skills (e.g. you may have data on complaints relating to communication, recent incidents, or a CQC inspection may have highlighted some communication issues) and emphasise the need for change (see section 2 for more guidance).

f) **Evidence on the benefits of SAGE & THYME training:**

From research in a hospital setting, SAGE & THYME Foundation Level workshop participants show a significant increase from pre to post workshop in:

- perceived **confidence, competence and willingness to explore emotional concerns** of patients
- **knowledge**
- **self-efficacy and outcome expectancy** (needed to translate the skills taught into practice)
- **expert-rated participant behaviour** when speaking to a simulated patient.<sup>4,5</sup>

**Motivation** to use the skills in practice, and the **perceived usefulness** of the SAGE & THYME model, are high after the workshop.<sup>5</sup> 95% of participants plan to change practice.<sup>4</sup> 100% participants would recommend the training to others<sup>4</sup>.

**After the training (2 weeks/2 months) - staff report:**

- Structure helpful<sup>5,6</sup>
- Increased confidence<sup>5,6</sup>
- Gave control<sup>5</sup>
- Feel satisfied about supporting patients<sup>5</sup>
- Conversations more patient-focussed<sup>5</sup>
- Left patients feeling satisfied and empowered<sup>5,6</sup>
- Use SAGE & THYME structure with others (not just patients)<sup>5</sup>

In a different study with district nurses, knowledge and confidence in helpful communication behaviours improved and was **sustained two months after training**. Motivation to use the SAGE & THYME model was high and remained so at two months. Some nurses reported that the model saved them time.<sup>6</sup>

Note that using SAGE & THYME in conversations can help staff wellbeing too, as they report feeling more satisfied and in control.<sup>5</sup>

## 2. Strategic fit

Explain how running SAGE & THYME training would fit with your organisation's strategy. This may include: quality of care; patient experience; staff development and overall fit with the general mission statement of the organisation. For example:

- **Communication:** to achieve an organisational, transformational change in the way staff speak to patients/carers/students/others and each other.
- **Patient related outcome measures:** to reduce communication-related complaints about the services, to improve on measures of patient satisfaction related to communication.

<sup>4</sup> Connolly M, Perryman J, McKenna Y, Orford J, Thomson L, Shuttleworth J, Cocksedge S (2010). SAGE & THYME: A model for training health and social care professionals in patient-focussed support. Patient Education and Counseling; 79: 87-93.

<sup>5</sup> Connolly M, Thomas JM, Orford J, Schofield N, Whiteside S, Morris J, Heaven C (2014). The impact of the SAGE & THYME foundation level workshop on factors influencing communication skills in health care professionals. Journal of Continuing Education in the Health Professions; 34 (1): 37-46.

<sup>6</sup> Griffiths J, Wilson C, Ewing G, Connolly M, Grande G (2015). Improving communication with palliative care cancer patients at home - a pilot study of SAGE & THYME communications skills model. Eur J Oncol Nurs: DOI: <http://dx.doi.org/10.1016/j.ejon.2015.02.005>

- **Staff related outcome measures:** to reduce grievances lodged by staff; to reduce sickness and absence; and to reduce communication-related problems highlighted in Healthcare Incident Reporting Service (HIRS) reports; to improve staff morale/wellbeing as measured in the staff survey.

Use current data from your organisation (and possibly others too for comparison) to demonstrate the issues – this could come from internal or external reports, Friends and Family Test, complaints data, CQC outcomes etc.

If possible, build in funding to evaluate the impact of the training on some/all of the above: this will help you to demonstrate value for money and patient/staff outcomes ready for the next funding request to continue with the SAGE & THYME training.

### 3. Training options

- **Other options:** mention other training programmes available in your area (e.g. from training companies, universities, hospices).
- **SAGE & THYME training:** introduce SAGE & THYME as a way of plugging the skills gap (more information can be gained from the 'basic guide' to SAGE & THYME – this can be downloaded from: [www.sageandthymetraining.org.uk/basic-guide](http://www.sageandthymetraining.org.uk/basic-guide)). Explain whether you would like to run the face-to-face SAGE & THYME Foundation Level and/or SAGE & THYME Online workshops.

### 4. Preferred option

Outline the reasons for choosing preferred option:

- a. The SAGE & THYME training is based on evidence in the literature regarding how to deal with concerns and provide patient centred care and is nationally recognised for teaching foundation level communication skills.
- b. A paper has already been published on the use of the model (Connolly et al, 2010): analysis from 412 participants suggests that the workshops had a significant positive effect on self-confidence ( $p < 0.0005$ ), self-perception of competence ( $p < 0.0005$ ) and willingness to explore the emotional concerns of patients ( $p < 0.0005$ ). 95% felt that the workshop would be very likely to have an impact on their practice. [http://www.pec-journal.com/article/S0738-3991\(09\)00248-1/abstract](http://www.pec-journal.com/article/S0738-3991(09)00248-1/abstract)
- c. More in-depth research has been undertaken to investigate the effects of the training on factors that influence communication skills in healthcare professionals and the paper was published in 2014. The findings show that the training significantly increases staff knowledge (both in a knowledge test and in a behaviour assessment from an expert in communication skills), their self-efficacy and outcome-expectancy: <http://onlinelibrary.wiley.com/doi/10.1002/chp.21214/abstract>
- d. The University of Manchester conducted some research on running the SAGE & THYME Foundation Level workshop for district nurses. The findings were that it: provided a structure for opening and closing conversations; led to a patient-centred approach; increased knowledge about communication behaviours, increased confidence in communication skills and left staff feeling motivated to use the model (these changes were sustained 2 months after the training).

Some staff reported that using the model in their conversations saved them time.

[http://www.ejoncologynursing.com/article/S1462-3889\(15\)00026-5/abstract](http://www.ejoncologynursing.com/article/S1462-3889(15)00026-5/abstract)

- e. The SAGE & THYME training has been picked up by a number of independent reports - see: <http://www.sageandthymetraining.org.uk/evidence>
- f. Many organisations, including NHS Trusts, CCGs, hospices, universities, councils and charities have taken licences to run the training. Interest in the training continues to grow. See the map of current organisations running the workshop (you might wish to name drop local competitors or highly regarded organisations: <http://www.sageandthymetraining.org.uk/organisations-licensed-teach-sage-thyme> (click on 'view SAGE & THYME in a larger map' to list a list of the organisations.) You might also wish to use a quote from someone (see <http://www.sageandthymetraining.org.uk/what-people-say-about-sage-thyme>).
- g. It is taught in at least **5 of the 10 NHS Trusts in the Shelford Group** (<https://shelfordgroup.org/>).
- h. It might also be helpful to refer to one or more of the **case studies** on how other organisations have adopted the training (see <http://www.sageandthymetraining.org.uk/case-studies>). These case studies will also give you useful tips in preparing to adopt SAGE & THYME.

## 5. Details of proposed option

- **Trainees:** explain to who the training will be delivered (all/specific staff).
- **Facilitators:** explain who will deliver the training (you may intend to use internal and external facilitators) and how many facilitators you will need (three at the very minimum but ideally at least four to allow for staff sickness/annual leave). Explain whether you may increase the number of SAGE & THYME facilitators over time. Contact the SAGE & THYME team if you need more advice on how many facilitators you might need, depending on how many people you wish to train per year.
- **Number of workshops and staff trained:** explain how many SAGE & THYME Foundation Level and/or SAGE & THYME Online workshops you plan to run per year and how many members of staff/volunteers/students you intend to train (you can teach up to 30 people per Foundation Level workshop and 20 people per Online workshop).
- **Venue(s):** detail where training will be held (it is easier to teach in an open room without desks or tables), or which online meeting platform you will use (Zoom is recommended due to the functionality it provides - further details available on request).
- **Resources:** explain what resources will be required to deliver the training (a computer and a projector and screen for the PowerPoint presentation; flip chart paper and coloured pens for the small group work; a SAGE & THYME digital pack for each person trained; facilities to show a DVD/film accessed via the internet; tea and coffee for delegates for the mid-session break in face-to-face training).
- **Champion:** explain who supports the proposed introduction of SAGE & THYME training and any comments that they have had.

## 6. Details of the SAGE & THYME developer

- **Developer:** the SAGE & THYME training was developed by members of staff at Manchester University NHS Foundation Trust (formerly University Hospital of South Manchester NHS Foundation Trust) and a patient in 2006. Its aim is to teach the core skills of dealing with people in distress.
- **Developer details:**  
Manchester University NHS Foundation Trust (MFT)  
SAGE & THYME Team  
Education and Research Centre  
Wythenshawe Hospital  
Southmoor Road  
Wythenshawe  
Manchester  
M23 9LT  
  
Tel: 0161 291 4210  
E-mail: [sageandthyme@mft.nhs.uk](mailto:sageandthyme@mft.nhs.uk)  
Web: [www.sageandthymetraining.org.uk](http://www.sageandthymetraining.org.uk)
- **Track record:** MFT has delivered the training to its staff since 2006 and has trained around 1900 SAGE & THYME facilitators. The original SATFAC course (that trains people how to run the SAGE & THYME courses) was developed with the Maguire Communication Skills Unit at the Christie NHS Foundation Trust - experts in delivering communication skills training.

## 7. Legal and financial considerations

- **Legal:** explain that a licence is required from MFT in order to run the training. This is a legal agreement. There is limited scope to amend this agreement during negotiation so legal costs to your organisation should be minimal/none.
- **Financial:** explain the costs of setting up and running the training:
  - **Training costs for SAGE & THYME facilitators** (SAGE & THYME Foundation Level workshop followed by SATFAC course, or SAGE & THYME Online followed by Online SATFAC and Assessment) - see current price list (<http://www.sageandthymetraining.org.uk/prices>) for fees charged for Manchester courses - training can be delivered locally and a quote can be provided on request.
  - **Annual licence fee** (refer to basic guide, see also <http://www.sageandthymetraining.org.uk/licence>) for guidance.
  - **Delegate packs** – now in a digital format provided as part of the licence fee.
  - **Reflect & Refresh training** – recommended once the trained facilitators have run a few workshops, to improve and refine their skills - see current price list (<http://www.sageandthymetraining.org.uk/prices>) for fees charged for Manchester courses.

- **Optional e-learning course** – to refresh the skills taught on the SAGE & THYME Foundation Level/Online workshop.
- **Annual Study Day** – it is recommended that at least one facilitator attends this one-day event held in Manchester/online.
- **Venue hire** (if necessary – this may be free).
- **Catering** (for face-to-face training break - drinks for 30 people + 3 trainers).
- **Travel expenses** for facilitators (if necessary).
- **Income generation:** if you plan to offer the training to staff outside your organisation, explain that you can charge a small fee (currently a maximum of £90 per person) to cover the costs of running the training, but that you cannot make a profit.

## 8. Funding options

Suggest where funding will come from (e.g. Trust reserves, training budget or Continued Professional Development (CPD) funding, charity money (because SAGE & THYME is an enhancement, above and beyond, not just standard training, and benefits both patient and staff), Macmillan grant, Health Education England funding etc.) and mention how some costs can be covered by charging delegates (if appropriate - see above).

## 9. Timetable

Complete the following table with timescales and people carrying out actions:

Action	Time period	Action by
Identify at least 3-4 potential SAGE & THYME facilitators who meet the person specification and understand what is involved in being a facilitator		
Identify source of funding		
Book facilitators on SAGE & THYME facilitator training		
Apply for licence (by completing licence application form) and decide if this will include the e-learning course		
Facilitators received training (they need to pass the SATFAC/Online SATFAC course)		
Licence agreement agreed and signed		
Book venue/online meeting room		
Set up email for sending digital pack to delegates with their registration confirmation		
Commence training		
Evaluate training from delegate feedback		
Review training two months before licence needs to be renewed		

## 10. Management arrangements

- **SAGE & THYME mentor:** provide details who will be the main person responsible for implementing the training and support the SAGE & THYME facilitators.
- **Senior manager support:** mention a high-level person in your organisation who fully backs the introduction of the training programme and will act as an advocate within the organisation.

## 11. Other resource implications

- **Administration:** you may need an administrator to assist you in: booking venues; ordering catering; advertising training; booking people on to workshops; sending out the digital delegate packs; invoicing external trainees (if any); collating evaluation forms.
- **Printing:** you may need a small budget for printing posters/leaflets advertising the workshops and for printing the certificates of attendance if you do not email them.
- **Staff replacement costs** (if appropriate): you will need the line managers to allow their staff to be released for approximately 4.5 hours to attend the training (allowing one hour before the workshop to set up and half an hour at the end to debrief with the other facilitators). In some areas, this may require staff back-fill.

## 12. Risk assessment

Use the following as a starting point:

Nature of risk	Likelihood of risk	Impact of risk	Actions required	Actions carried out by
Staff attending SATFAC/Online SATFAC course do not pass it	Low	High – if too many people fail, there may not be enough facilitators available to run the workshops.	Ensure that staff put forward to become facilitators meet the person spec, understand what running SAGE & THYME training entails, and are aware of the demands of the SATFAC/Online SATFAC course. Aim to train up more than 3 facilitators.	
Authorised facilitators may not run the SAGE & THYME training as they have been taught to do by MFT (which would breach the licence terms)	Low	Medium - could impact on effectiveness of the training; could result in MFT terminating the licence agreement; in rare circumstances could lead to a delegate being emotionally disturbed	Ensure that facilitators understand the importance of not deviating from the training received	
External delegates may not pay their fees	Low	Medium - could make a loss if it runs training courses and is then not paid for them	Include terms in workshop booking form regarding payment	
Uptake of training may be lower than expected	Low	Medium - may result in workshops being cancelled due to lack of uptake	Secure senior management support or training and communicate this well with all staff	



Nature of risk	Likelihood of risk	Impact of risk	Actions required	Actions carried out by
SAGE & THYME facilitators who deliver the training could leave	Medium	High - this may impact on delivering training depending on the number of SAGE & THYME facilitators available	Train at least 4 people to deliver SAGE & THYME training	
A complaint may be raised by someone who received the training and was unable to deal with a distressed patient	Low	Medium – the person would need to prove that the problem they experienced was due to the training	Make delegates aware of the limitations of the training	

### 13. Key benefits and outcomes

If your organisation took a licence to run the SAGE & THYME Foundation Level/Online workshop it would be able to:

- a. Deliver evidence-based communication skills training to all its staff
- b. Train up to 30 people per Foundation Level workshop/20 people per Online workshop
- c. Provide refresher training to staff via an e-learning course every year or two (if e-learning module is purchased)
- d. Ensure that the concerns of patients and their carers, colleagues and others are addressed
- e. Give staff, students and volunteers a structured and quick approach for dealing with the concerns of patients/carers/others
- f. Improve customer care
- g. Help staff to feel more satisfied and in control of the conversations they have with patients/carers
- h. Meet [*relevant local/national*] guidelines

### 14. Conclusion

- Summarise the main points of relevance to your organisation.
- Consider working out the cost of providing the training per person trained (based on the numbers you have used above).

### 15. Help answering business case questions

If you need help answering any questions on your organisation’s business case template, or would like it reviewed before submission to ensure that all relevant information about SAGE & THYME has been included, please contact the business lead for SAGE & THYME: [joanne.thomas@mft.nhs.uk](mailto:joanne.thomas@mft.nhs.uk) or telephone 0161 276 6965 for assistance.