

Fife Health and Social Care Partnership

Draft Report V. 03

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Introduction : Fife IJB is a relatively new organisation coming into being on the 1st April 2016. It is also a new type of organisation combining elements of the NHS and of the Council in a bold move to manage the community related interface between these two large organisations in a more comprehensive and effective way. As a new organisation it also has a new team who have been charged with ensuring that the organisation fulfils its promise.

The organisation has however been launched at a time of financial austerity when the wider health and social care environment, at a national level, is experiencing real financial challenge.

This, in combination with a number of other factors translates into some real financial challenges for the IJB both in the current year (2018/19) and particularly looking forward over the next 3 years and beyond (see below).

As a response to these challenges the key partners i.e. the Council, the NHS and the IJB approached the Scottish Government to request some assistance to help develop a plan that would assist in turning around the current poor financial outlook and provide a more stable platform moving forward.

In response to this request the author was asked to provide some help to the IJB, reporting to the CO Michael Kellet but also engaging with the SLT and in particular with the CFO Jen McPhail

The report that follows describes the work done to date and presents the suggestions in support of delivering the above i.e. an improved financial position. The exact scale of the likely improvement is out with the scope of this particular short assignment albeit a number of ideas have been developed and quantified to facilitate future work.

It is important to note that this work has not been focused on financial due diligence and that I have in the main accepted the information presented at face value.

Approach : To try and get a quick appreciation of the organisation, its challenges, its way of working, the level of experience of the SLT and its current position I:

- a) Reviewed a number of relevant organisational documents ranging from the Organisational Strategy and Annual Report etc to the month 6 Finance Report and Recovery Plan.

- b) Attended the October IJB Board meeting (for the finance components) to observe how they approached, demonstrated understanding, supported and held to account the organisation in relation to the whole finance agenda.
- c) Attended the SLT Savings Huddle and the SLT Medicines Efficiencies Huddle to improve my understanding of the work already being done, to observe how it worked and to engage and make a few limited suggestions regarding areas that they could consider.
- d) Interviewed the majority of the SLT to better understand the challenges they were facing and to discuss, on a one to one basis their reactions to a number of proposals that I was considering, (see below)
- e) Interviewed the IJB outgoing Board Chair and chair of the Finance and Performance committee to obtain their independent non executive perspective
- f) Interviewed the CEO and DoF of both Fife Council and Fife NHS, as the two sponsoring bodies to better understand their particular positions and views on what is required to make progress.
- g) Had a workshop with the finance team to facilitate their support and initiate a number of different pieces of work. Data from this very successful session is still being received and will be included as far as possible
- h) Had an increasing number of sessions with the CFO to test my understanding and request various cuts of different elements of the financial data
- i) Organised a workshop with the procurement team as above. This meeting was unfortunately cancelled late on the day and is currently being reorganised
- j) As above with Workforce directors and their teams. This should take place sometime during week commencing Monday 12th November.

These interactions in the whole have been positive with SLT members in particular demonstrating a strong desire to make a strong contribution to this agenda. They did, in the main, also demonstrate that this is a new organisation with a new team and a new Board that is still trying to get into its stride.

Snapshot: This section describes where the organisation has come from, why it is where it is and where it might be in three years time should there not be a fundamental change in how the organisation recognises and addresses its financial challenge. The numbers have all been provided by the IJB's internal team:

[Pages 4 to 32 redacted – section 30 (c) of FOISA exemption applies]

Conclusion

It is clear that Fife IJB faces a very significant challenge. It also clear that it will take some time to address that challenge and that success will require every aspect of what the organisation does and how staff engage to be reviewed and if beneficial to change.

The challenge should be embraced.

With the right leadership focus, excellent engagement and comms, and dedicated high quality resource Fife IJB has the opportunity to not only address the issue that presents at the moment but to create a 'Make Fife Great' culture where continual improvement is embedded through all levels of the organisation. Adopting an ambitious approach to how the current problems are tackled should ensure that they don't reappear. Treating the problem as a one of task will guarantee that they do.

Specifically I would recommend that

- The organisation recognises it is where it is and puts all its energy and knowledge into addressing the current financial challenges
- It recognises and owns the data shown in the forecast section of this report. The point is not how accurate the figures are but rather the message i.e. if there is not a material change then a version of the forecast could become the reality which has absolutely no upside.
- The IJB fully embraces the challenge and invests its time and resources in identifying, testing and implementing improvements as part of the day job
- A much tighter control system is implemented including the development of a business case culture to ensure that all decisions are considered and objective
- A performance, finance, project, control and communications framework and or strategy is created in partnership with the two key stakeholders to shape how challenges will be tackled and moved forward.
- The key messages from the very recently published Audit Scotland report on H&SC Integration are jointly discussed, accepted, or not and embedded into how the IJB and its partners do business.

Its all to play for.

APPENDIX A

[Text redacted – section 30 (c) of FOISA exemption applies]

APPENDIX A cont

[Text redacted – section 30 (c) of FOISA exemption applies]

Appendix B

[Text redacted – section 30 (c) of FOISA exemption applies]

Appendix B cont

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