

Business Plan

FY18 Q3 Report

- 1** To make care a joint endeavour with patients, families and carers
- 2** To improve the quality of care by transforming services
- 3** To support teams to improve the safety and quality of care they provide
- 4** To support leaders to maintain a positive culture for teams
- 5** To ensure Oxford Health NHS FT is high performing and financially viable
- 6** To lead research and adopt evidence that improves the quality of care
- 7** To embed and enhance the electronic health record

Priority	Workstreams
1. To make care a joint endeavour with patients, families & carers	<ol style="list-style-type: none"> 1. Deliver patient involvement and experience strategy (trust-wide) 2. Deliver the carers strategy
2. To improve the quality of care by transforming services	<ol style="list-style-type: none"> 1. Deliver Oxfordshire Community Pathway : Locality & Bed Based services (OPD) 2. Deliver new Learning Disability service (Adults) 3. Deliver improved Adult MH pathway (reduce OATS) (Adults) 4. Deliver CAMHS Transformation (CYP) 5. New Care Models 6. Estates Redevelopment
3. To support teams to improve the safety and quality of care they provide	<ol style="list-style-type: none"> 1. Deliver Quality Account priorities 2. Deliver Oxford Centre for Quality Improvement 3. Implement the recommendations from the Mazars review
4. To support leaders to maintain a positive culture for teams	<ol style="list-style-type: none"> 1. Deliver recruitment & flexible workforce management solutions 2. Deliver workforce strategy to attract and retain staff 3. Deliver Leadership and Management Development pathways (includes mentoring, conferences, clinical leadership) 4. Deliver Equality, Diversity & Inclusion Strategy
5. To ensure Oxford Health NHS FT is high performing and financially viable	<ol style="list-style-type: none"> 1. Deliver the Cost Improvement Programme 2. Embed New Performance Team and Performance Management Framework 3. Embed Patient-level costing and Service Line Reporting
6. To lead research and adopt evidence that improves the quality of care	<ol style="list-style-type: none"> 1. Biomedical Research Centre (BRC), Collaboration for Leadership in Applied Health Research & Care CLAHRC, Clinical Research Facility (CRF), Clinical Research Network (CRN), Diagnostic Evidence Co-operative (DEC), Medtech & Invitro diagnostic Co-operative (MIC) 2. Deliver Case Records Interactive Search 3. Deliver effective Research Management Group
7. To embed and enhance the electronic health record	<ol style="list-style-type: none"> 1. Refine and enhance existing EHR functionality 2. Deliver New Data Warehouse 3. Reporting Presentation Layer 4. Enhance core IT infrastructure

Seven Priorities- Progress Updates (Priorities 1-2)

Priority	RAG	Project Title	Progress Update
1. To make care a joint endeavour with patients, families & carers	Yellow	Deliver patient involvement and experience (PEI) strategy	The PEI strategy objectives identified for commencement in 2016/2017 & 2017/18 have not been fully achieved but a number from 2018/19 have begun. Local priorities have guided the commencement of some objectives. In total, 9 out of the 61 objectives have been fully completed; 37 are currently in progress and a further 15 are yet to be started. The objectives which have been completed include implementing new methods for 'You Said We Did' monitoring, rolling out the use of 'I Want Great Care' across remaining areas, developing methods for sharing learning and good practice and Peer support work developments. The capacity of the PEI Team continues to grow to support the progression of outcomes across the Trust.
	Green	Deliver the carers strategy	The Carers Involvement Lead has been appointed and takes up the post early March 2018. Interactive carer awareness training for staff is in development and review of senior leaders JD's to ensure they include involving patients and carers is underway. Strategy developments continue to be driven by Friends, Family and Carers Forum.
2. To improve the quality of care by transforming services	Yellow	Deliver Oxfordshire Community Pathway : Locality & Bed Based services (OPD)	District Nursing Service Efficiencies A plan to deliver efficiencies has been agreed: to modify existing SPA, drawing on pilots being run in other areas in order to identify efficiencies which will be implemented from May 2018.
	Green		Developing neighbourhood working (ILT Phase 2) More efficient working with GP practices: neighbourhood teams being developed as part of larger scale project ' Joint Enterprise' (a legal entity involving GP federations, OHFT & OUH) comprising 18 neighbourhood teams which will deliver these objectives.
	Yellow		Development of District Nursing Workforce Workforce planning and skill mix project running January - Sept 2018, run by community matron. District Nursing are running a pilot benchmarking capacity. A staff model is agreed in principle, communicated and tested with staff and is now being implemented. Other workstreams include: Preceptorship / Induction, DN Band 6 upskill, DN Workshop Support, Frailty Upskilling, and DN Course Management.
	Yellow		Community Hospitals – Consultation Public consultation still planned for revised timetable, to start May 2018.
	Green	Deliver new Learning Disability service (Adults)	Learning Disability services continue to embed into OHFT. A Post 100 days plan is in place to address any outstanding actions. A Transformation programme plan is currently being finalised, and a Communications plan is also being written to support transformation work.
	Yellow	Deliver improved Adult MH pathway (reduce OATS) (Adults)	Peer Support Training has been delayed to April 2018, with the first cohort of Trained workforce expected to be in post by September. The scope of the Single Point of Access has changed, and a plan is being worked on in line with developments around out of hours support. Work on Age appropriate assessment facilities is scheduled to start w/c 22nd January, to develop out of hours assessment facility and place of safety. We are working with 3rd sector colleagues to identify sites for Crisis Café type of provision. A capital funding bid in progress to aid with the delivery of these facilities.
	Green	Deliver CAMHS Transformation (CYP)	Swindon, Wiltshire, Bath & NE Somerset A Transformation Project is to be launched in January, with a team configuration update required before April 2018. We are currently scoping priority technological developments to support this transformation as there is a large emphasis on online interventions and support.
	Green		Buckinghamshire New reporting requirements have been agreed and information is being provided. A first draft of the annual review is now complete and a stakeholder event is scheduled to take place in February.
	Green		Oxfordshire Staff consultations have taken place in a phased approach and all but two are now completed. EHR and reporting configuration updates are scheduled for end of January, Single Point of Access is now set up, staff are being trained, and a Go Live date of 1st February is on track.
	Yellow	New Care Models	Thames Valley & Wessex Forensic Network (Adults) Further repatriations have taken place in Q3. Relationships between all parties are developing and the New Care Model is working well. Activity and finance reports suggest a favourable position that is overperforming compared to the Business Plan projections. Further work continues with data validation. Work is progressing to develop Community Forensic services within the Network. A funding opportunity will be released in January with a focus on areas where community provision is extremely low.
Green	Eating Disorders New Care Model (CYP) A full Business Plan has been developed and approved by OHFT Board. The Business Plan has been sent to partner providers for approval, and submitted to NHS England and signed off in January 2018. We are working with fellow providers to ensure that bed and pathway management is in the best possible position prior to full Go Live in April.		
Green	Estates Redevelopment	T4 CAMHS New Care Model (CYP) We are revisiting the initial bid with provider partner organisations, and widening the scope of original proposal to include Low Secure CAMHS provision to aid with unpicking blockages in the CAMHS system.	
Green		Warneford redevelopment consultation with local planners and stakeholders completed. Proposals for clinical accommodation, research accommodation are being developed. Initial phasing plans and feasibility drawings are in preparation. Littlemore redevelopment Master Plan included in draft estates strategy. Estates strategy workshop to be held to review in January 2018. Development of delivery and phasing programme, and financial case delayed awaiting results of estates strategy workshop to develop direction.	

Seven Priorities- Progress Updates (Priorities 3-4)

Priority	RAG	Project Title	Progress Update
3. To support teams to improve the safety and quality of care they provide	Green	Deliver Quality Account priorities	The Q2 update report has been formally presented to Board and shared with our external stakeholders for comment and to start the development of 2018/19 objectives. We continue to link in with quality objective leads and prepare for year-end external audit and reporting.
		Deliver Oxford Centre for Quality Improvement	<p>The Centre name is confirmed as Oxford Healthcare Improvement (OHI), and the Centre base is now occupied and operational. Our vision statement is agreed. Our strategy paper is in development and will incorporate a decision about the relative strengths of available models / frameworks chosen to guide the OH approach. A mapping exercise of current directorate projects is underway to set out current activity, including which methodologies are employed. Recruitment is underway and we are attracting a high calibre of staff. We are also attracting study placements for people interested in improving safety.</p> <p>The Extended Executive Team and Centre Leads are engaged with OHI to develop the leadership approach to cultural change and learning. Capability building has commenced through Leadership Development Programme and Preceptorship Programme.</p> <p>We are supporting two NHSI collaboratives (Engagement and Observation & Admission / Discharge Criteria Led Care) in the Adult Directorate. We are developing our relationship with OXINMAR. Our first joint project has been agreed (RCT in pressure damage).</p>
		Implement the recommendations from the Mazars review	<p>Board members reviewed and discussed the mortality trends from the last 3 years of data up to Sept 2017 in a seminar in Dec 2017. The data will be published at the Jan 2018 board meeting. A presentation is planned to take place with the CQC in Jan 2018. The NED with lead responsibility for learning from deaths has transferred as planned.</p> <p>Directorates have established weekly forums to review all unexpected deaths or where there have been concerns identified by family/ staff in relation to care prior to the death. These forums are reporting into the senior clinical weekly review meeting and Trust-wide mortality review group.</p> <p>The new process for screening and categorising deaths has been in place for 6 months, a FAQ sheet is being developed to sit alongside the guidance and policy to support teams. An audit to review the new process is planned for Q4.</p>
4. To support leaders to maintain a positive culture for teams	Yellow	Deliver recruitment & flexible workforce management solutions	A strategy to convert as many agency employees as possible onto bank/flexible workforce has begun. A financial incentive has been put into place for payments to all those who convert. A drive to recruit HCA's to support a strategy of using only substantive or flexible workers going forward has been very successful, however issues have arisen with a shortage of resources to induct and train these individuals.
		Deliver workforce strategy to attract and retain staff	The newly formed Employee Relations team has launched and a wider communication with a direct dial contact for HR is to be issued soon. HR 'ask us' software management tool is under development and will assist managers with FAQ's and easy access to HR/Managers documents. In future, the Snr HR Business partners will be focussing less on ER cases and more on the wider HR strategic agenda. Over the next few months the Senior HR Business Partners will contribute to the development of the Snr BP HR strategy supporting: staff retention, bullying and harassment, stress, reward etc.
	Green	Deliver Leadership and Management Development pathways	<p>Approximately 50 apprentices are starting with OH as employer provider, with another 11 being procured for external provision in partnership with Facilities. A Potential graduate status programme has been identified to be delivered in-house. We are awaiting university accreditation.</p> <p>The first cohort on the Leadership pathway are continuing, with a second cohort of 20 in the process of being recruited.</p> <p>We continue to support 25 nursing associates and are beginning recruitment for a second cohort who will start next academic (and financial year). A project manager has been appointed who is lead the skill mix work.</p>
		Deliver Equality, Diversity & Inclusion Workplan	<p>Staff Equality Network meetings were held in Oxon and Aylesbury, with good attendance and increasing membership. A new LGBT staff group was set up in High Wycombe, with planning underway to establish a learning difficulties/disabilities group. LGBT groups developed supporting plans for marking LGBT History Month in Oxon and Aylesbury. We are working in collaboration with network members on actions from the race equality and LGBT equality action plans.</p> <p>We have continued promotion of staff equality networks.. We visited NHS Nottinghamshire Healthcare to gain insight into their LGBT inclusion policies and practices. We completed a very successful Black History Month. Anti-Bullying Week was marked with a new Staff Support Hub on our intranet. The Trust's Equality Analysis Policy and Procedure is to be updated.</p> <p>Two successful Linking Leaders Conferences on 'Compassionate Leadership' were delivered during the quarter, and we are preparing EDI input into 2 apprenticeship diplomas from April 2018.</p>

Seven Priorities- Progress Updates (Priorities 5-6)

Priority	RAG	Project Title	Progress Update
5. To ensure Oxford Health NHS FT is high performing and financially viable	Red	Cost Improvement Programme	Adults Directorate In Q3 delivered £834,161 Vs plan of £791,603 (+5%), in FY18 forecast to deliver £1,194,817 Vs Target of £2,100,000. The reason for YTD variance is in relation to over performance for Forensic Services New Care model. This will be reviewed on a monthly basis. The main risk associated with adult directorate CIP's is related to the Patient Pathway Transformation, there are several out of area treatments (OAT's) at the moment and all efforts will be made to recover this position in Q4. Adults are forecasting to deliver below target due to limited opportunities and lack of plans.
			Children & Young People Directorate In Q3 delivered £473,250 Vs plan of £473,250 (100%), in FY18 forecast to deliver £632,000 (of which £378,000 is non recurrent) Vs Target of £1,700,000. There has been no slippage YTD. Children and Young People are forecasting to deliver below target due to limited opportunities and lack of plans.
			Older Adults Directorates In Q3 delivered £377,244 Vs target of £815,024 (-54%), in FY18 forecast to deliver £474,241 (of which £150,000 is non recurrent) Vs Target of £2,100,000. The reasons for slippage include cost pressures in relation to Community Hospital agency staffing. Integrated Locality Teams have identified skill mixing opportunities and posts to be removed but they are currently occupied or covered by pay protection. Older Adults are forecasting to deliver below target due to the slippage outlined above, limited opportunities and lack of plans.
			Support Services In Q3 delivered £544,830 Vs plan of £412,520 (+32%), in FY18 forecast to deliver £654,884 (of which £246,7288 is non recurrent) Vs Target of £1,500,000. There has been some slippage in a Pay Rationalisation scheme. Some new mitigations have been identified in HR, L&D and Nursing & Clinical Governance. Support Services are forecasting to deliver below target due to limited opportunities and lack of plans.
	Green	Embed New Performance Team and Performance Management Framework	A Service Change delivery plan and highlight report is delivered to Strategic Delivery Group monthly for scrutiny, challenge and assistance resolving risks and delays. The Service Change and Delivery team is now developing three key 3-year programmes across the trust to align all change activity with strategy.
	Yellow	Embed Patient-level costing and Service Line Reporting	Development of the business front door has been compromised through workforce and recruitment challenges where the new team have been working at c.30% under establishment. A revised trajectory of development and implementation is now end of Q1 2018/19 where forecast recruitment to full establishment is end of Q4 2017/18. The budget for the new Performance Team has been established, and non-pay costs are to be absorbed where possible in 2017/18 as a one off arrangement.
6. To lead research and adopt evidence that improves the quality of care	Green	Biomedical Research Centre (BRC)	GL chart of accounts is aligned to SLR. FY18 budgets are aligned to Service Lines. Board Finance report and Directorate Finance reports include financial performance by service lines. New Financial Management structure implemented but need to finalise cover arrangements for Head of Financial management post. Developing variance reports for SLR.
		Collaboration for Leadership in Applied Health Research & Care (CLAHRC)	Looking at budgets for year 2 to enable new starters to be in post in April and where funding permits to start people in post sooner. BRC theme leader meetings take place monthly with themes establishing other meetings to support the ongoing research. PPI Strategy drafted and is with the NIHR for comments. New PPI Manager to start in February to finalise strategy and operationalise it.
		Clinical Research Facility (CRF)	Funding extended until September 2019. Discussions across Oxford continue to look at what the shape of the next CLAHRC application will be. This will be dependent upon the remit announced by the NIHR which is yet to be determined. Discussion ongoing including looking at potential of enabling pull through from OH and OUH BRCs.
		Clinical Research Network (CRN)	Internal Trust management structure is in place. Cross site CRF Board membership under discussion. Funding competition completed to support research at JR in line with CRF remit. Delays in identifying clinical space at JR site. Work continues to support early phase work linked to BRC. Awaiting refurbishment work to commence at Whiteleaf centre to run later phase clinical research studies.
		Diagnostic Evidence Co-operative (DEC)	Waiting refurbishment work to commence. Working group established to roll out consent to recontact for research purpose.
		Medtech & Invitro diagnostic Co-operative (MIC)	Completed, funding ended Dec 2017
		Deliver Case Records Interactive Search	Comments in contract returned to NIHR with contract due to be signed Jan 2018. Funding started Jan 2018
Deliver effective Research Management Group	UK CRIS is being used by the Trust clinical audit team. We continue to engage with Business Intelligence and Performance teams to use CRIS. Working group with Trust wide membership established to roll out consent for recontact process.		
		Attendance and engagement continues. Quarterly dashboard reports are being submitted. Meeting provides good collaborative opportunities. CRN funded staff that were previously managed by OUH are to be moved under Oxford Health NHS management structure under Associate Director of R&D. This will enable better cross cover and staff opportunities to engage in more variety of studies and activities and bring into line with Trust Governance structures.	

Seven Priorities- Progress Updates (Priority 7)

Priority	RAG	Project Title	Progress Update
7. To embed and enhance the electronic health record	Green	Refine and enhance existing EHR functionality	<p>During Q3 there have been extensive exchanges with OneAdvanced in an attempt to move forward with the outstanding contractual deliverables, specifically e-Prescribing and Medicine Administration (ePMA) and Interoperability / Integration. OneAdvanced have confirmed that they are now willing to supply a comprehensive ePMA solution. The details around this are currently being worked through. As part of this, discussions are occurring with OneAdvanced to reset the core contract. This is an essential requirement to conclude before the Trust can decide how best to proceed with extending the contract past the current May 2019 deadline. A more detailed paper related to this will be provided to the Trust's BoD in due course.</p> <p>Clinical Transformation work during Q3 has been focussed on Community Hospitals. Phase 1 is now concluding; this included the Admission pack, key Assessments and Care plans, together with Delayed Discharge information being completed on Carenotes negating the need to dual input into the separate PJD boards. Phase 2 is being scoped together with OP Community Services and School Health Nurse Service transformation projects.</p> <p>The electronic exchange of defined information from Carenotes to GP systems is now being increased to include Part 1 and 2 Summaries and Community Hospital Discharge Summaries (building on the existing Interim Discharge Summary that's already operational). Further county-wide roll out requires Carenotes functionality due in the next version of Carenotes (5.9), expected in early 2018.</p> <p>View only access to GP Primary Care Data directly from within Aداstra and Carenotes via the MIG is now live. This solution will make access to clinical information more streamlined. It was accessed over 200 times on the first day it was implemented.</p>
		Deliver New Data Warehouse	<p>Expansion of the new data warehouse continues based on when new reports are required. Progress has been somewhat curtailed due to capacity issues within the Performance and Information Team - the volume of requests being received by this team and the existing under establishment of staff means that existing reporting is being prioritised. In collaboration with the Head of Performance and Information, the BI Team's roadmap has been revised and modified to reflect the new priorities. Based on this, excellent progress has been made on creating the Trust's main statutory report in-house (i.e., MHSDS). By bringing the creation of this report in-house, as opposed to relying on the Carenotes supplier, the BI Team have been able to improve the quality and completeness of the report. In addition, significant time will be saved by the Performance and Information Team due to the new automated processes for creating the report. The report is entering final acceptance testing before go-live.</p>
		Reporting Presentation Layer	<p>The BI Team continues to work closely with the Head of Performance and Information in order to promote the use of Self-Service BI to improve productivity and efficiency for both teams. Work has been completed to produce information governance dashboards which highlight potential patient access breaches in Carenotes.</p>
		Enhance core IT infrastructure	<p>Although the Trust is well-protected, the cyber security threat continues to evolve, and hence a comprehensive programme of works is under way to ensure that related risks are mitigated and the underpinning digital infrastructure is protected. This programme comprises NHS-focussed workstreams in conjunction with NHS Digital, an independently-based workstream based on the SANS Institute CIS Critical Security Controls for effective cyber defence, and the deployment of additional on-premises tools.</p> <p>Work on the background migration to Office 365 hosted services continues. Approximately 60% of the Trust's live email is now held within Office 365, and we are on-track for our target mail migration completion date at the end of February. Migrated users are already taking advantage of their 100GB mailbox size amongst other benefits. The IT Service has engaged with a specialist third party focusing on achieving IT-enabled business change, in order to maximize the opportunities presented by the implementation of Office 365. A comprehensive branded communications plan will be released within the next quarter, which will feature material to engage the workforce and provide new IT-enabled ways of achieving more rapid results for every staff persona within the organisation.</p> <p>The rollout of new Ricoh MFD devices is now largely complete, with planning underway to remove fax services in line with the Paperless 2020 initiative, as well as enable printing for Apple mobile devices. Some challenges were faced in locations that are not routinely issued Trust ID cards however these have been overcome.</p> <p>Previously reported spend patterns related to PC Replacements continue to be seen, with the capital replacement project running to budget.</p>

RAG Key	Milestone Status
Red	Milestones delayed
Amber	Milestones at risk of delay
Green	Milestones complete and/or on track