



## Executive Summary – Business Case

Meeting:		Date:	
Report Title:		Agenda Item:	
Author:		Business Case Ref:	
Executive Lead:			

Purpose of Report:			
Assurance	Approval	✓	Information

Impact on Strategic Objectives (positive or negative):		Positive	Negative
SO1	Provide safe, effective, caring and responsive services		
SO2	Achieve NHS constitutional patient access standards		
SO3	Achieve excellence in employment, education, development and research		
SO4	Lead strategic change within Staffordshire and beyond		
SO5	Ensure efficient use of resources		

Summary of other meetings discussed with and outcome of discussion:

### Executive Summary

#### Tips for writing an Executive Summary:

- It should be a short review (5% to 10%) of the main document
- Paragraphs should be short and concise using language appropriate for the audience
- The summary should be able to stand on its own (i.e. understandable without having to refer to the main document)

#### Situation

- *What are you writing about and why are you writing about it?*
- *What is the purpose of presenting to this Group / Committee?*
- *Describe the positive or negative impact on the Strategic Objective*

#### Background

- *Any relevant background in order to provide context?*
- *Where else has the issue been discussed and what was the outcome?*

#### Assessment

- *What are the key conclusions (positive or negative)?*
- *What are the solutions?*
- *Areas of concern / items for escalation?*
- *Positive assurances to note?*
- *Key work being commissioned / underway?*

### Financial Summary

Financial Summary	2020/21	FYE
Income	£	£
Revenue Cost	£	£
Return on investment	%	%
Contribution	£	£
Capital Required	£	£

### Key Recommendations:

FOI REF 553-2129

## Letter of Representation:

I confirm the following:

- This business case has been reviewed and supported as a Divisional Priority.
- This business case links to the Annual Plan and Clinical Service Strategy.
- The Divisional review process has involved other Divisional areas, within the Trust and external to the Trust, that might be affected as a result of its implementation.
- All associated costs for the business case have been agreed by each Division affected by its implementation e.g. CWD, Estates and Central functions.
- I have assured myself that the case is complete and contains accurate information as a reliable basis upon which the Trust can make an informed decision.

<b>Divisional Management Team</b>	<b>Name</b>	<b>Date approved</b>
<b>Associate Director</b>		
<b>Divisional Chair</b>		
<b>Divisional Business Advisor</b>		
<b>Divisional Nurse Lead</b>		
<b>Divisional HR Manager</b>		
<b>Divisional Strategy &amp; Planning Manager</b>		

- This business case has been reviewed and is supported by the following who may be affected as a result of its implementation

<b>Divisional Support</b>	<b>Name</b>	<b>Date approved</b>
<b>Medicine</b>		
<b>Surgery</b>		
<b>Specialised</b>		
<b>CWD</b>		
<b>Estates, Facilities and PFI</b>		

## 1. Measurable Benefits

What are the benefits to the Trust/ Patients/ Staff of implementing this case and when can they be expected to be achieved? Indicate measures against which success can be demonstrated e.g. LOS now (in days) and reduced LOS (in days) anticipated as a result of the case being implemented.

For each measure, provide the current metric, the target metric and when the target is expected to be achieved.

These KPI's will be reviewed as part of the Benefits Review Process and therefore need to be SMART.

Benefits Profile (KPI's)			
Benefit Description	Measures/Indicator Current State	Measures/Indicator Future State	When

## 2. Case overview

Provide a commentary of what is proposed

## 3. Detailed Workforce and Recruitment Plan

Provide a detailed workforce and recruitment plan. How does this link into the Divisional workforce plan produced as part of the Annual planning process (or explain why the workforce plan did not identify these posts). The plan should include assurance of the ability to recruit to the required post(s) to ensure delivery of the case.

## 4. Commissioning Implications

Provide a clear statement of any commissioning implications. What discussions with commissioners and UHNM contracts team have taken place? What has been agreed?

If there are no commissioning implications associated with the case please state clearly why.

## 5. Links to CIP initiatives

Indicate whether the business case is linked to a current or planned CIP initiative.

## 6. Risks associated with implementing the Business Case

The tables below should only include risks of implementing the business case

Detail only the risks that are outside of the directorate's control in the table below.

Risks outside the directorates control		
Risk	Actions to Mitigate	RAG


*Detail only the risks that are inside the directorate's control in the table below*

Risks inside the directorates control		
Risk	Actions to Mitigate	RAG

## 7. Monitoring and Evaluation

### Divisional progress monitoring

*Detail is required as to how the Directorate will monitor the progress of this Case and evaluate it against the financial and non-financial benefits detailed within the Case. The Directorate will also need to detail the progress of the financial and non-financial benefits in reports and state where these will be presented to for information.*

### Corporate progress monitoring

Following from business case approval, a 6 month review is required to be brought to Executive Team to review the progress and implementation of the KPIs stated within the case. This will provide Executives with assurance that the KPIs stated within the case can be/are being delivered/track their implementation. This review will also be presented to the appropriate approval committee for information i.e. Performance and Finance Committee or Performance and Finance Committee and Trust Board depending on where final approval was given.

Should the Executive team request a further review this will be noted and Business Planning/PMO will ensure that the update will be brought to the specified formal executive team as requested.

## 8. Detailed Project Plan

*Describe in detail the key milestones and the date they are planned to be achieved*

Milestone Action Tracker	
Date	Milestone

## 9. Capacity Implications

Confirm how any additional staff or additional activity will be accommodated in the Hospital e.g. the need for new offices, additional Outpatient clinics, additional bed capacity, additional theatre sessions, and changes to patient transport arrangements etc.

Confirm how any changes to existing arrangements will affect how the current accommodation is used e.g. extended hours of use, etc. Has office accommodation been identified for all posts?

Confirm any changes needed to the building infrastructure e.g. additional wall ports, building alterations, additional telephones, additional electrical sockets, etc.

Confirm any PFI additional costs e.g. to the Unitary Payment.

Facilities Required	How Many	Action for this to be implemented
IP Beds Required		
DC Beds Required		
Weekly Theatres Sessions		
Critical Care Bed Capacity		
Weekly Outpatient Clinic Requirements		
Weekly CTS Clinic Requirements		

## 10. Co-Dependencies

Provide details of all co-dependencies with other services within / outwith UHNM, upon which the success of the business case depend e.g. recruitment and/or training of specialist staff

### Clinical Support Services Requirements (Should link to Financial Appendices)

Directorate	Activity	WTE	Finance	Agreed with CD / DM
Pharmacy				
Clinical Technology				
Imaging				
Pathology				
Outpatients				

## 11. Job Planning Consistency Panel Statement (Consultant Appointments only)

Confirm when the Consultant Job Plan was reviewed by

- 1) The Divisional job planning process and
- 2) The Trust Job Planning Consistency Panel and a summary of the outcomes.

*A copy of the draft job plan should be included as an appendix to the case.*

## **12. Options considered**

*Provide a range of options considered and reasons for discounting them (where applicable.) Confirm and justify the preferred option. Include any service improvements/re-designed processes which have been considered as an alternative to additional investment.*

## **13. Value for Money e.g. benchmarking**

*Provide benchmarking data from comparable Trusts that help to support the case. Include the data source and the most up-to date information that is available.*

## **14. Financial Summary**

*Insert F&A*

FOI REF 553-2122