

Case Study

NHS East Midlands

Successful migration to NHS SBS – Achieving efficiency through Best Practice

Key facts

- Manages the performance of 9 Primary Care Trusts, 9 Acute trusts, 4 mental health trusts and 1 ambulance trust
- Employs 300 full time equivalents
- Managed a budget of £474 million in 2008-9
- Manages East Midlands health economy at a value of £ 5.8 billion

Case Study summary

Best Practice operational implementation

Structured and enhanced continuous improvement

Structured, flexible, proven migration methodology

Improved control, reporting and benchmarking



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Richard Wheeler Deputy Director of Finance, NHS East Midlands

Although the organisation joined NHS Shared Business Services (NHS SBS) relatively recently, NHS East Midlands is already enjoying the benefits that moving to NHS SBS can bring. Its successful migration also means that NHS East Midlands has some useful advice for other organisations thinking about a move to NHS SBS.

Why did NHS East Midlands choose NHS Shared Business Services?

The drivers for a strategic health authority (SHA) review of shared service provision were set out in a paper presented to the Audit and Risk Committee, and included:

- NHS Operating Framework 2008/09, which recommended that all NHS organisations review NHS SBS against current provision
- Financial strategy for NHS East Midlands, which encouraged all organisations to consider their arrangements for financial shared services
- PCT and Foundation Trust governance structures, where change to legal structures and focus affects shared service operations
- Internal audit key financial systems review provided limited assurance for the services provided by its previous provider DSS for 2007/08

- Electronic working at NHS East Midlands was well behind other public and private sector operations and NHS SBS offered the opportunity to get started far more quickly than was possible with the previous provider.

Richard Wheeler, Deputy Director of Finance at NHS East Midlands, was particularly impressed with the value added services offered by NHS SBS: "NHS SBS offers a number of value added services that are important for NHS East Midlands: we were very interested in NHS SBS's online requisitioning, which is not only very effective, but reduces our consumption of paper and lowers our carbon footprint.

"The improved reporting capabilities and greater analytical capacity were also important factors in our decision making and because the NHS SBS service allows budget holders direct access to reports and transactional data the Finance team can spend more time on core activities instead of running off standard reports. We were also interested in operating at NHS SBS's best practice levels as early as possible so that we could demonstrate these and use them to support other NHS organisations in the region."

NHS SBS began the project to migrate NHS East Midlands as a client in September 2008, with go live taking place in January 2009. Kathryn Tuddenham, NHS East Midlands Project Manager and Assistant Director of Finance, was particularly pleased with the migration plan and execution: "We needed, and received, a clear project plan that was well communicated with identified milestones, clear templates for data capture, a highly skilled NHS SBS project team from start to finish of project, NHS SBS process and Oracle expertise, quality training and great post-implementation support."

Kathryn continues: "Another key reason for the success of the project was achieving full engagement with our own staff. Fully involving Management Accountants on the NHS SBS project team ensured that issues were resolved and client colleagues were fully engaged.

Kathryn adds that they also scheduled project weekly team meetings within the SHA, bringing in the NHS SBS team every two weeks to monitor progress against the project plan and ensure consistent communications. NHS SBS produced a tailored manual for budget holders, explaining basic tasks around the system and setting up new users.

To find out how NHS Shared Business Services can help your organisation, please contact Monica Owen, Marketing Director, on +44 (0)7970 052065 (monica.owen@sbs.nhs.uk)

What was it like working with NHS SBS?

“Working with the NHS SBS team was really good,” says Kathryn. “The migration team were professional, open and flexible and really understood the needs of NHS East Midlands. Since go live, we’ve found that their operations colleagues are equally co-operative and responsive. Overall feedback from our users has been positive.

“There were some initial user problems. For instance in Finance there were issues around access to information in a similar format to the legacy system, but support from the NHS SBS team and the new Discoverer Saveable application enables staff to develop their own reports.

“We’ve worked in partnership with the NHS SBS team to jointly develop a check list that will prevent or minimise the impact of these issues for other trusts looking to join NHS SBS.”

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Kathryn Tuddenham, NHS East Midlands Project Manager and Assistant Director of Finance

Why did NHS East Midlands go for Best Practice so early and how has it gone to date?

“We went for Best Practice as early as possible because we were keen to ensure that our processes were efficient and effective. The move to NHS SBS provided the opportunity to review processes, gain assurances on quality and to identify any gaps.”

After one month on the system, NHS East Midlands’ compliance level was 41% overall, which was higher than

anticipated. The Best Practice evaluation also highlighted some checks and reviews that had not been previously considered, but were useful to ensure the system was being utilised to its full potential.

Kathryn says: “NHS East Midlands will be developing a plan to implement actions to improve compliance, aiming to achieve full compliance by the end of FY 2009/10.

Improved management information

- Financial reports developed to provide budget holders with greater information about their budgets, spend to date and commitments
- Budget holders taking increased ownership of their budgets, using their online reporting to challenge and drive conversations with Finance, rather than the other way round
- Improved forecasting and cash management across the organisation
- Developing user capability, giving users direct access to Discoverer reports, supporting the move towards increased ownership of budgets by budget holders

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- Continuing the move to more paperless finance and accounting systems, on-line ordering, invoice approval and reporting
- Increased use of eProcurement, and implementation of purchase ordering systems for costs not traditionally using this route, such as Multi-Professional Education and Training (MPET) expenditure.

Summary

- Better information for budget holders
- Developing user capabilities
- Improved forecasting and benchmarking
- Continuous improvement processes
- A real cultural shift for NHS East Midlands

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Kathryn Tuddenham

Data Security - Information Governance Assurance Framework Level 2 accreditation

Award Winning - Winner of two National Outsourcing Association Awards 2009

World Class - Hackett global benchmarking

Real Savings - On target to deliver substantial savings to NHS Trusts

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