5 Year Strategy 2015 to 2020
and Annual Plan 2015/16

Better Every Day
Dorset HealthCare is a Trust that is on a journey. We are ambitious to keep improving for our patients and our vision is to lead and inspire others through excellence, compassion and expertise in all that we do.
Our purpose is to deliver integrated healthcare services that empower people to make the most of their lives and we do this as a team of 5,300 people working in communities across Dorset, as well as in Devon and Hampshire.

We are committed to being a learning organisation and our important collaborative partnership with Bournemouth University (BU) helps us in our goal to provide the highest quality, evidence based care, seeking to continually enhance service delivery.

The Trust Strategy and Annual Plan have been written in a health context where the focus is on changing models of care, innovation and improvement. Nationally, NHS England has set out its Five Year Forward View and locally, we are collaborating with our health and care partners for the delivery of the Better Together vision and the Dorset Clinical Services Review (CSR). This document takes account of and is consistent with the vision and emerging strategic direction of health services both locally and nationally, emphasising integrated, community-based services with a strong primary care interface at the heart.

The Dorset Clinical Services Review is at once a significant challenge and opportunity for Dorset HealthCare. Whilst some aspects of our current business may be taken forward by other organisations, we equally have the opportunity to move forward with real innovation and service integration, whether in existing or new areas of business.

Dorset HealthCare has already transformed its service management into thirteen localities that are co-terminus with the GP localities and our focus now must be on building and consolidating the local relationships with general practice. By allocating our resources across the localities and working in partnership with primary care, we believe we will achieve better integration and outcomes for our patients. Being innovative and flexible with our care pathways, focusing on the frail elderly and, delivering our role in the Better Together programme will help us to build our reputation as the natural partner for service integration.

We aspire to be a national leader in the effective integration of care across physical and mental health/health and social care boundaries and we are already working with Bournemouth University to research, implement and evaluate new approaches to integration.

Our ambitions for the outcome of the Dorset Clinical Services Review are:

- more patients being treated out-of-hospital, being provided with comprehensive and integrated care at home;
- our community hospitals having a clearly defined function and purpose;
- parity between and integration of mental and community health services;
- Dorset HealthCare being the natural provider of these services, in the most appropriate setting, for people of all ages. In many services Dorset HealthCare will be the Lead Provider, in others we will be a sub-contractor.

Our expectation is that Dorset HealthCare will be the preferred and best provider of community and mental health services, but we know that we do not have the right to be in that position.

We will strive to achieve this by delivering against our strategic objectives and by demonstrating that we have the compassion and expertise to achieve excellence outcomes with our patients. Underpinning all of that will be the development of a network of innovative partner relationships, including with Local Authorities, general practice, acute providers, independent and third sector providers and others. Our refreshed partnership with Bournemouth University will support us to move forward with innovation, education, research and evaluation that demonstrate we can be trusted to deliver and to do what we say we will do.
Our journey over the last two years

In 2013/14 Dorset HealthCare was found by the regulator Monitor to be in breach of its licence conditions and subject to Enforcement Undertakings to address a number of failings identified by the Care Quality Commission (CQC). In June 2014 Monitor was satisfied that the new Trust leadership had dealt with the issues that caused the Trust to breach its licence conditions and that it had a clear plan, “The Blueprint”, to take the Trust forward. The Trust was no longer in breach of its licence conditions.

The Blueprint set out thirty-six deliverables for improvement and a clear direction of travel for organisational excellence, grouped under six key themes:

- leadership and Board development;
- organisational development and our people;
- governance, quality and risk management;
- staffing;
- performance and information reporting;
- partnership working and participation.

One of the key deliverables within The Blueprint was to refresh our Trust vision and purpose and to develop a new set of strategic goals for the next five years. The Board approved the new Trust vision and refreshed Trust Strategy (2015 to 2020) in January 2015. The past two years have seen considerable change at Dorset HealthCare. Without doubt we have made significant improvements to our governance arrangements and in the way that we have transformed our management structure into thirteen integrated locality teams. But change, even when delivering improvements can also be unsettling for an organisation and its staff and our focus now is to ensure stability across the Trust, so that everyone can maintain their focus on ensuring the high quality of care for our patients.

Our Strategic Plan for 2014/15 to 2018/19 was submitted to Monitor in June 2014 and was rated by Monitor as green.
Developing our Strategic Goals, Vision and Purpose

From October 2014 to January 2015, we refreshed our Trust vision and purpose, inviting all staff to describe their vision and ambitions for the future and to share their beliefs about what we do, why we do it and how we do it. Ten workshop sessions, an online survey and further engagement opportunities involved approximately 450 to 500 staff. Outputs from stakeholder discussion groups at the Trust’s Annual Members’ Meeting in September 2014 helped develop our Strategy. In October 2014, Monitor produced a toolkit to help the Trust’s develop their five-year strategies which proposes a seven-stage model.

We have used this framework to help develop our five-year Strategy, taking the Trust Board through the stages at various Board workshops from 2014 to 2015 and presenting to the Trust Council of Governors meetings in November 2014 and January 2015.

Our refreshed vision, purpose and strategic goals provide the building blocks on which to continue our organisational development. Further detailed stakeholder engagement is planned through 2015, as part of the ‘Evolve’ stage of the Monitor seven-stage model.

We continue to share our strategic goals, vision and purpose with staff, patients and partners – helping us to be clear about what it is we should be doing to make our vision a reality.
Our **vision and purpose**

**At the heart of the Trust is the organising principle of being Better Every Day.** This guides us in all that we do and provides a single common thought that applies not only to the experience and outcomes of our patients and of our staff.

For everyone who connects with Dorset HealthCare and its services, whether patient, partner or member of staff, we want them to have that sense of improvement and that every day, even the smallest changes are enabling us to be better for the people we serve and our workforce.

Alongside that organising principle, is our Trust vision. Our vision sets our ambition for the future, to guide and inspire all staff.

**Our vision is:**
To lead and inspire through excellence, compassion and expertise in all we do.

Staff described Dorset HealthCare as somewhere that should be leading the way and inspiring, both locally and nationally. We want to inspire patients, partners, local people and professionals alike by achieving excellent clinical outcomes and experiences, by supporting people with compassion, care and kindness and by being experts in our roles.

We are guided by a clear statement of purpose for Dorset HealthCare. This sets out what we do and why we do it.

**Our purpose is:**
To provide integrated healthcare services that empower people to make the most of their lives.

We care for people when they’re unwell, support their recovery and give them the knowledge and confidence to stay as healthy as possible.

Together, our vision and purpose statements support all of us to stay focused on what’s important overall, which we can sometimes lose sight of in the day-to-day demands of our role.
Who we are and who we serve

We provide a comprehensive range of integrated healthcare services, including community and mental health services, to people of all ages. Twelve community hospitals offer services including elderly care, inpatient rehabilitation, outpatient appointments, theatre, therapy services, and minor injury services. In addition, the Trust delivers the Steps to Wellbeing service in Hampshire and Prison Health Services in Dorset and Devon.

Dorset HealthCare employs over 5,300 members of staff and has a budget of £240 million to a population of 787,000 people.

Our local area

The population of Dorset is amongst the oldest in England, with 22.5% over 65, compared to an English average of 16.4%. An increasing number of these people are living alone and becoming more vulnerable. In contrast, only 36.8% of the population in Dorset is 20-39, compared with the national average of 41.6%. This means that not only are our patients increasingly complex but also that our workforce is aging, too, presenting a significant challenge to the Trust.

Although Dorset is on average more prosperous than the rest of England, there is large variation between regions, with some areas of high deprivation, most notably in Weymouth and Portland and areas of Bournemouth.
National context: the NHS Five Year Forward View

In October 2014 NHS England, Monitor and the Trust Development Agency published the ‘Five Year Forward View’, a report detailing their collective vision for the NHS in the next five years. This has become the basis of planning for the delivery of health care in England.

The ‘Five Year Forward View’ warns that based on current trajectories, a combination of growing demand, no further annual efficiencies, and flat real terms funding could produce a mismatch between resources and patient needs of nearly £30 billion a year by 2020/21. To deal with this, the document proposes a three pronged approach of demand management, improved efficiency and if these two are delivered, an increase in funding from central Government.

The NHS will need to deliver integrated services, breaking down the barriers between family doctors and hospitals, between physical and mental health, and between health and social care. The future will see far more care delivered locally, but with some services in specialist centres and organised support to those with multiple health conditions.

What this means for Dorset HealthCare

Our five year strategy and two year delivery plan are aligned to the vision and plans in the Five Year Forward View. We are an ambitious organisation and share the ambitions set out nationally to transform services and organisations so that the NHS is sustainable and continues to improve the quality of its care. The vision for change represents a major opportunity for us.

The Trust is already leading in the delivery of integrated services in Dorset, having transformed its service management arrangements so that physical and mental health services are integrated and operate in thirteen localities that are on the same footprint as primary care and GP services. In Bridport we have broken down the boundaries between family doctors and our community services, bringing real improvements to our patients and being recognised by consultants from McKinsey, who are leading the Clinical Services Review, as a beacon of good practice and an example for others to follow. We are already working with GPs to develop similar models in the Weymouth and Portland and Purbeck localities, in Poole and Bournemouth, sharing our learning and good practice.
Local context: Financial Sustainability of the Dorset health economy

The diagram below illustrates that by 2021, the Dorset health economy will have an annual shortfall in excess of £200 million, moving from a reported surplus of funding in (A) to a shortfall in (B&C). This means that the local health economy will reach a point where it can no longer pay for the services required. To address the financial pressures that are facing the NHS in Dorset, the Clinical Commissioning Group has commissioned a Clinical Services Review (CSR).
The Dorset Clinical Services Review (CSR)

The CSR will produce a single plan for all health services in Dorset (excluding dentistry) that will set out how services need to change to cope with the increasing demand and limited budgets. Its objective is to ensure the NHS in Dorset provides quality, safe and clinically and financially sustainable services for the future.

Dorset Clinical Commissioning Group will be leading a major programme of public consultation on the proposed plans within the Review in the late summer of 2015.

What this means for Dorset HealthCare

The Trust’s clinicians are actively participating in the development of the plans within the review and once these plans are published, the Trust will want to gain the views of its patients, service users and staff about the Review’s proposals.

The drive for more people to be cared for nearer to their home will be a key agenda item of the Review and therefore an opportunity for the Trust. As described above, the Trust is already leading in the development of these new ways of working and is in the process of building partnerships with GPs and other providers to help facilitate the delivery of these new service models.
Partnership with Bournemouth University

The Trust set the strategic aim to achieve University status when it became a Foundation Trust in 2007 and has held this status since 2010, further strengthening its relationship with Bournemouth University. The key drivers for formalising the partnership through University Status between the two organisations were:

• To attract and retain high quality staff by providing the opportunity to work in an environment in which innovation, teaching and the thoughtful evaluation of practice are valued by all disciplines;
• To support innovation through all of the Trust’s activities both Clinical and non-Clinical;
• To support the professional development of staff through formalised links to the training and development opportunities available through the University;
• To develop university clinics as centres of clinical excellence;
• To promote clinical research opportunities.

Since first signing the Memorandum of Understanding the Trust has become the major provider of integrated out-of-hospital services in Dorset and beyond, significantly adding to its portfolio of services. A refreshed Memorandum of Understanding has been developed as part of The Blueprint action plan and both organisations have recommitted to the aims of their Partnership.

The Trust has also reinforced its commitment by recognising the importance of the partnership in its strategic goals:

To be a learning organisation, maximising our partnership with Bournemouth University and promoting innovation, research and evidence based practice

The partnership with Bournemouth University is also one of the Trust’s nine key delivery themes for 2015/16, setting out how this partnership will help the Trust deliver on all seven of its strategic goals.

This recommitment to our partnership demonstrates that as forward thinking organisations, together we are committed to improved care through innovation, education, research and evaluation, trying to become “Better Every Day”.

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Challenges and opportunities

A summary of our challenges and opportunities is presented in the diagram below. The combination of increased competition and changing commissioning priorities has the potential to significantly affect the way that Dorset HealthCare moves forward. Yet alongside that, there are clear opportunities for the Trust to build on its competitive advantages of significant skills and experience in delivering community services and its estates, to become the clear system leader in Dorset for integrated, locality-based care.

**Growing demand**
Dorset’s ageing population and the increasing prevalence of deprivation in some areas will result in increased demand from the patients and service users for key services that we provide.

**Commissioning priority: care closer to home**
The focus on care closer to home by commissioners will require the redesign of care models to improve patient care and experience, and deliver more care in the community.

**Commissioning priority: integrated localised personal care**
The focus on integrated, localised personal based care across physical and mental services requires internal improvements in integration between our own services, as well as building on existing relationships with other providers to offer a seamless care experience.

**Relationship with commissioners**
We must improve our commissioner relationships to retain our current contracts and adapt to increased competition. This requires understanding commissioner service requirements and the specific needs of each locality.

**Financial pressures**
Funding constraints will give rise to greater pressure on our finances, forcing us to deliver greater value and efficiency. Additionally it is likely that there will be changes to our cost base due to increasing staff wages.

**Increasing competition**
Other FTs, as well as private and third sector providers are increasingly competitive, we must improve our offering to defend the current services that we provide.

**Geographically unequal service provision**
We must improve the coverage of our core services to reach every locality, as well as ensuring our services are tailored to the needs of each locality’s population.

**Estates technology & IT**
We must improve our estates, technology and IT systems to facilitate more efficient delivery of services, to allow us to improve quality and deliver better value to commissioners.
The Trust’s Strategic Goals

To meet the challenges and opportunities that the Trust will face over the next five years, the Trust has set the following seven Strategic Goals:

1. To provide high quality care; first time, every time
   Quality is at the heart of everything the Trust does and hopes to achieve. To deliver high quality care, first time, every time is the foundation on which the rest of the Trust’s strategic ambitions are built.

2. To be a valued partner and expert in partnership working with patients, communities and organisations
   Partnership with patients, service users, families and carers is a key foundation on which the development and delivery of all the Trust services should be planned and built.

   Partnership with GPs, other hospitals and third sector providers is an important theme for the future development of the NHS. The Trust has a key aspiration to be an expert in the development and delivery of many different partnership forms that the NHS will need over the next five years, and in doing so to become the organisation other organisations come to for help and advice, and to be seen as their best partner option.

3. To be a learning organisation, maximising our partnership with Bournemouth University and promoting innovation, research and evidence based practice
   The ability to share learning from the Trust’s successes and mistakes to everyone within the Trust is another key factor to the Trust’s future success.

   The Trust is also keen to promote innovation, research and evidence based practice. Bournemouth University is the Trust’s key partner in this area and increasingly over the next five years the Trust and the University will be working more closely in the development of the Trust’s services.

4. To have a skilled, diverse and caring workforce who are proud to work for Dorset HealthCare
   The development and support of “our people” is crucial to the success of the Trust. The Trust is therefore totally committed to building an organisation that its people are proud to work for.

5. To be a national leader in the delivery of integrated care
   To break down the barriers in how care is provided between family doctors and hospitals, between physical and mental health and between health and social care is a key aspiration of the NHS over the next five years. The Trust has a proven track record and key set of skills in the development and delivery of this way of working and based on this expertise wishes to develop its role as a local and national leader in the development and delivery of integrated care.

6. To ensure that all of the Trust’s resources are used in an efficient and sustainable way
   Correcting any historic inequities in service provision, with services being shaped around the needs of the people using them;

   Using the resources of which we are the public guardian, finance and estates, as productively as possible in delivering those services.

7. To raise awareness within the Trust and externally of the impact that our work has on people and our environment and take steps to reduce any negative effects
   We have a Corporate Social Responsibility to be aware of the impact that our work has on people and our environment and to take steps to reduce any negative effects. The Trust is committed to ensuring the concepts of Corporate Social Responsibility are embedded in the way that it plans and delivers its services.

These seven Strategic Goals form the bridge between the Trust Vision and Purpose and enable the Trust to prioritise its work plan for the next five years.

The next sections of this document describe the key delivery themes for 2015/16 that will enable us to achieve against our strategic goals.
Key Delivery Theme One: Quality Strategy

Working towards delivery of Strategic Goals:

1. To provide high quality care; first time, every time and 3. To be a learning organisation, maximising our partnership with Bournemouth University and promoting innovation, research and evidence based practice.

Dorset HealthCare Quality Strategy for 2015-2018

Dorset HealthCare is currently refreshing its Quality Strategy for 2015-2018. This reflects national and local quality improvement priorities.

Nationally there are a number of reports that emphasise the importance of quality and safety and their recommendations which have been taken into consideration when developing the Strategy, and the Annual Quality Priorities following from it. These include the Mid Staffordshire NHS Foundation Trust Public Inquiry; the Sir Bruce Keogh’s Review into the quality of care and treatment provided by fourteen hospital Trusts in England; Compassion in Practice; and the CQC’s new Fundamental Standards of Care.

The Strategy and Priorities also reflect local areas for improvement and learning which we have identified internally, such as making sure services are consistently following best practice guidelines, and externally, for example through our CQC and Mental Health Act inspections which identified care planning among areas for improvement.

The Trust has aligned its quality objectives to the five CQC domains, which provide us with a clear framework to guide, monitor and measure our quality improvement activity for the next three years. These are:

<table>
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<th>Domain</th>
<th>Quality Objective</th>
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| Safe   | • To embed a culture of no harm and reduce avoidable harm across all our services  
|        | • Improvements in record keeping and involvement of patients in their care plans  
|        | • To continually improve quality of care through learning from events, listening to our patients and sharing good practice |
| Effective | • To ensure all our have staff have the skills and competencies to deliver high quality, evidence-based practice  
|           | • Through innovative and creative practice integrate local services around the needs of our patients respecting diversity and cultural values |
| Caring  | • Staff are kind, caring and compassionate in all their contacts with patients, family/carer's, peers and visitors  
|         | • Patients and families/carer's report that they are treated with dignity and respect |
| Responsive | • To reduce variation of service provision so there is an equity of service provision across Dorset  
|           | • To give all patients, families/carer's every opportunity to feedback their experience of care within our services |
| Well-led | • To be open and transparent when things go wrong and work with our service users to continually improve our services  
|         | • Robust systems and processes of quality assurance to promote delivery of high quality services and the line of sight from team / ward to Board |

The quality objectives will be reviewed regularly to ensure that they remain relevant and continue to support our Trust vision and strategic goals. To support the achievement of the quality objectives the Trust identifies quality priorities, which are widely consulted on within the organisation and with our commissioners and partners.
Annual Quality Priorities

The Quality Priorities areas and indicators for 2015/16 are:

• **Experience** - lessons learned from the findings from local investigations and reviews will be shared beyond the team involved to improve the experience of our patients;

• **Safety** - to promote safe and therapeutic staffing levels within community mental health teams (including home treatment) and district nursing teams;

• **Clinical effectiveness** - support staff to implement the National Institute for Health and Care Excellence (NICE) quality standards with accessible, user friendly guidelines and policies to enable the provision of high quality evidence based care to our patients.

The current key strategic risks to meeting the Trust quality goal and objectives are relating to the Trust’s plans for 2015/16:

• Failures in care due to gaps in adherence to assessment care planning policy / guidelines; poor use of risk assessments or other lapses in protocol;

• Inadequate staffing levels due to insufficient workforce availability, high rates of staff turnover; unplanned absences; skill mix; inadequate workforce planning; and failure to motivate, engage, retain talent;

• Ineffective clinical leadership in some areas caused by change programmes; uncertainty; and failure to recruit, retain and develop clinical leaders;

• Weak locality governance caused by failures to agree, communicate and work according to an effective system of locality governance or failures to identify and report on relevant SMART performance data;

• The financial challenge due to lack of budgetary control, lack of resilience on CIP programme development; or failure to capitalise on commissioners’ discretionary payment schemes;

• Lack of resilience caused by a failure to integrate services with Local Authority social care and other partners and to influence the outcome of NHS England commissioning intentions, Better Together, Dorset CCG and other commissioners.

The Trust has reviewed and refreshed its approach to risk management and developed a new Quality Performance Framework. These will be used to systematically identify and escalate operational and strategic risk and to ensure quality is maintained and promoted at all levels.
As stated in the Foreword to this document the Dorset Clinical Services Review represents potentially the biggest strategic challenge facing Dorset HealthCare over future years as parts of our current business could be undertaken by other organisations; however it is very positive that the Five Year Forward View is clear on the importance of having integrated services within localities with GPs central to this.

Dorset HealthCare has already taken big steps to work in this way, in October 2014 the Trust restructured the way it manages its services from a centralised management structure, to one based around the thirteen GP localities within Dorset.

As a result of this reorganisation all the Trust’s services that are delivered within a locality, both physical and mental health are now managed under a single locality manager. This means that all the Trust services can be very responsive to the individual needs of all thirteen of Dorset’s GP localities.

Over the next two years the Trust will be seeking to consolidate and build on the relationships it has with general practice.

As also mentioned earlier the Trust’s services in Bridport and the way they breakdown the boundaries between how care is provided between family doctors and hospitals is being seen as a beacon of good practice by consultants McKinsey, who are leading the Clinical Services Review.

The Trust is also working with local GPs developing similar models in Weymouth and Portland and Purbeck localities, as well as in Poole and Bournemouth, focussing with their GPs on improving outcomes for patients.

We will be innovating on how care is provided in relation to care pathway development and the Clinical Services Review by developing and improving care pathways for the frail elderly. We will be continuing to work with partners within Better Together, with integrated localities and teams, maximising the better relations we have so that Dorset HealthCare is seen as the natural partner for integration.

The Dorset Clinical Services Review represents a major opportunity for Dorset HealthCare as well as a potential risk. Our expectation is that Dorset HealthCare will become the preferred provider of community and mental health services providing a substantial share of these services within the county. The Trust sees working in partnership and the development of joint working as key to service delivery in the future and is actively seeking partnership opportunities. By working in this way it is believed that the Trust will increasingly be seen at a national level as a leader in the development and delivery of integrated care through the development of partnership.

Key Delivery Theme Two: Integration

Working towards the delivery of Strategic Goals:

1. To provide high quality care; first time, every time, 2. To be a valued partner and expert in partnership working with patients, communities and organisations and 5. To be a national leader in the delivery of integrated care.
Key Delivery Theme Three: Mental Health

Working towards delivery of Strategic Goals:

1. To provide high quality care; first time, every time, 2. To be a valued partner and expert in partnership working with patients, communities and organisations, 4. To have a skilled, diverse and caring workforce who are proud to work for Dorset HealthCare, 5. To be a national leader in the delivery of integrated care, and 6. To ensure that all of the Trust’s resources are used in an efficient and sustainable way.

The Trust is the major provider of mental health services in Dorset and over the next year the Trust will be working to strengthen its mental health services through the following ways:

- Strengthen acute mental health services so they are more efficient and effective, which will reduce the number of patients who have to be placed out of area; improve the quality of our crisis response service and of services within Dudsbury Ward, provide a local Psychiatric Intensive Care service for women; and enhance the care environment for service users;
- Undertake a programme of transformation to improve Children’s Emotional Health and Wellbeing across Bournemouth, Poole and Dorset;
- Work with the CCG to explore payment systems that will support service users recovery as well as service integration;
- Confirming the scale and scope of investment in relation to Chalbury and St Ann’s Hospital;
- Respond to the findings of the independent review of urgent care mental health services in West Dorset commissioned by Dorset CCG;
Key Delivery Theme Four:
Community Services

Working towards delivery of Strategic Goals:

1. To provide high quality care; first time, every time, 2. To be a valued partner and expert in partnership working with patients, communities and organisations, 4. To have a skilled, diverse and caring workforce who are proud to work for Dorset HealthCare, 5. To be a national leader in the delivery of integrated care, and 6. To ensure that all of the Trust’s resources are used in an efficient and sustainable way.

As the major provider of community health services in Dorset over the next year the Trust will be looking to strengthen the quality of its community services in the following ways:

- Work with local GPs, the CCG and other partners and local communities to define the role and function that each of our twelve Community Hospitals has within its local community;
- Continue to work within each of the locality making real the Trust vision of integrated locality working;
- Continue transformation of health visiting and school nursing workforce across Bournemouth, Poole and Dorset;
- Build on our integrated working with GPs such as that taking place in Cerne Abbas and Bridport for the frail elderly, and further develop these acknowledged leading edge services;
- Take forward our work with GPs, the local authority and others on models of provision of care in Weymouth and Portland, ensuring that this maximises benefits in making best use of estate, and progress this work in North and West Dorset;
- Profile and re-profile as necessary the role and function of community teams, linking this to improving efficiency and productivity in the way they work;
- Understanding the productivity and efficiency of teams, services and the Trust, as a basis for future transformation and cost improvement programmes; and driving improvements within new models of care, with our teams and in community hospitals.
Key Delivery Theme Five: Workforce and workforce development

Working towards delivery of Strategic Goals:

1. To provide high quality care; first time, every time, 3. To be a learning organisation, maximising our partnership with Bournemouth University and promoting innovation, research and evidence based practice and 4. To have a skilled, diverse and caring workforce who are proud to work for Dorset HealthCare.

The Trust has recently approved its HR Strategy 2015-2020. It has five core themes - attraction, recruitment, retention, recognition and development - which underpin two HR Strategic Goals:

- To become a recognised employer of choice so that we attract and recruit to meet our workforce needs;
- To retain a compassionate, expert workforce that is proud to work at Dorset HealthCare and feels developed and supported to make decisions, innovate and improve the lives of our patients.

We have been through a period of significant change and part of the purpose of the strategy is to create a stable environment for our staff. We have also experienced difficulties in recruiting and retaining staff in some staff groups and localities and recognise our recruitment challenges:

- There are national shortages of newly registered health professionals;
- The large number of small sites from which the Trust provide services, across a wide geographical area (much of it rural);
- That attracting staff to work with the over 65 age group in both physical and mental health services is difficult, but particularly so in mental health services.

Action in 2015/16 to address this will include:

- Development of an overarching workforce plan;
- Developing and delivery of an Attraction, Recruitment and Retention Strategy;
- Improving time to hire through maximising opportunities to utilise electronic workflow channels, available systems, paper reduction and workflow efficiencies;
- Improving options and availability of a range of temporary staff;
- The review of current working practices in relation to flexible working;
- Developing and delivering goals to improve the Trust’s Equality performance and outcomes and implementation of BME Workforce Equality Standard;
- Developing an organisational health and wellbeing strategy.
Dorset HealthCare’s Strategic Goal of being a learning organisation and its operational requirement to have an appropriately trained and skilled workforce practice will be supported by the following actions in 2015/16:

- New developmental pathways/programmes with educational partners to address gaps identified as a result of new models of working;
- Further embedding coaching and broaden provision;
- Redesign of the corporate induction, workplace induction and preceptorship to embed the Trust’s new Vision, Values and Behaviour Framework;
- Development and embedding a diverse portfolio of flexible learning opportunities;
- Continuation and further development of Board and leadership development programmes to meet evolving needs and support culture change;
- Introducing programmes to enhance the knowledge, skills, behaviours and confidence to deliver Better Every Day.
Key Delivery Theme Six: Bournemouth University

Working to deliver all seven of the Trust’s Strategic Goals:

As a Foundation Trust with University status Bournemouth University is one of the Trust’s key partners.

Over the last year the Trust has worked with the University to refresh the Memorandum of Understanding which exists between the two organisations.

Over the next year the Trust is committed to deepening the partnership with the University by not only working with the Faculty of Health and Social Sciences, but the University as a whole.

The aim of this work will be to support innovation and research with the Trust and help the Trust achieve its Strategic Goals of becoming a national leader in the delivery of integrated care and support its goal of being a learning organisation.

As well as working with the Trust on professional and organisation development, again helping the Trust achieve its Strategic Goals around having a skilled, diverse and caring workforce, who are proud to work for Dorset HealthCare. To provide high quality care; first time, every time, to be a valued partner and expert in partnership working with patients, communities and organisations.

The Trust is also keen to work with the University around its Strategic Goals in resource management and the impact that the Trust’s work has on people and our environment.

So how will this work be taken forward?

One proposal is that the Trust and the University form a Think Tank which meets on a quarterly basis. This will be a place where the Trust and all of the school of the University meet. Proposals and projects will be presented regarding how the two organisations can share expertise to solve real operational, research and development opportunities faced by the Trust.

An early example of this type of collaboration is the Trust and the University working together to devise a new delivery model for older people nursing and residential care homes. This type of project will not only pull on the expertise of the University around the delivery of health and social care, but will also include business modelling, as well as expertise in the built environment and innovative uses of IT.

It is proposed that this way of working together is reviewed during quarter four with any revised proposals being developed for the new financial year 2016/17.
Key Delivery Theme Seven: Organisational Development

**Working to deliver all seven of the Trust’s Strategic Goals:**

We want all of our staff to feel proud of their services and of working for Dorset HealthCare and we want them to feel it is an organisation they would recommend to family and friends, as an employer and as a healthcare provider.

In 2015/16 we will continue the work to improve as an organisation and use the launch of a refreshed vision and purpose as the platform for conversations with staff, to nurture an environment where everyone feels supported to be brilliant for our patients.

Making this real includes investing in team development opportunities, developing a Trust behaviours framework, a refreshed approach to appraisal to reflect our values and constantly challenging all areas of Trust activity to align with our vision, purpose, objectives and values.

We will also significantly strengthen our approach and mechanisms for staff engagement and recognition, acting on feedback from the 2014/15 staff survey, which told us that we must do more to make staff feel valued, recognised and supported to be brilliant for our patients. A core element of this will be improving our internal communications channels and our staff intranet.

We will build stronger relationships with local people and communities, creating more opportunities for them to influence the work of the Trust. Part of this will be renewing our relationship with our Trust Membership, working closely with the Council of Governors to give our members greater opportunities to engage with our services and strategic direction. A key focus will be growing and strengthening our relationships with service user representative organisations and community groups in each locality, recognising the real diversity of people we serve.

And we will continue to explore and trial emerging methods and channels through which to measure and assess overall organisational culture alongside levels of staff engagement, with a view to introducing staff engagement and organisational culture metrics and analysis to the integrated corporate dashboard.

**Participation and partnerships**

A priority focus will be improving the way that we engage and involve patients and the public in the work of the Trust, from individual patient experience through to collective involvement and being held to account by those we serve.

Central to this is improving the way that we produce, share and exchange information. This includes patient and public information, as well as content online, on social media and our corporate publications. The Trust participated as a pilot site for the national Information Standard and we will continue that work to improve our information and communications. This will be supported by a significant improvement to our website and digital channels, both in terms of the technology and the content.

In 2015/16 we will continue the work to improve as an organisation and use the launch of a refreshed vision and purpose as the platform for conversations with staff, to nurture an environment where everyone feels supported to be brilliant for our patients. Key elements of this include investing in team development opportunities, developing a Trust Behaviours Framework, a refreshed approach to appraisal to reflect our values and constantly challenging all areas of Trust activity to align with our vision, purpose, objectives and values.

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Key Delivery Theme Eight: Information Management & Technology

Working towards delivery of Strategic Goals:

1. To provide high quality care; first time, every time and 6. To ensure that all of the Trust’s resources are used in an efficient and sustainable way.

Our recently developed Information Management & Technology Strategy sets out how IM&T will support us in achieving our Strategic Goals and responding to local and national challenges facing healthcare provision. This Strategy is built upon a combination of:

- Local drivers, including our strategic objectives and the needs of the local population;
- National drivers, including the October 2014 “Five Year Forward View” strategy for the NHS and November 2014 national information framework “Personalised Health and Care 2020”.

We aim to use information technology to free staff time, increasing efficiency so that they can spend more time delivering high quality care to patients and service users.

The IM&T Strategy is structured around five themes:

- Provision of integrated data, information and knowledge systems to support high quality integrated care and support for new business and care models;
- Support for patients in making the right health and care choice;
- Provision of timely, robust and easily accessible information to enable effective decision making and ensure transparency as to quality of care;
- Harnessing the power of technology to improve efficiencies and productivity in both clinical care and support function pathways, including improved and interoperable information flows easily and secure access to those that need it;
- Building our IM&T services now and for the future.

Dorset HealthCare has budgeted for a major programme of new revenue investment in 2015/16, to meet operational requirements and support delivery of these objectives. Major programmes include:

- Upgrade of RiO and continued deployment of SystmOne patient administration systems;
- Investment in the Dorset Shared Patient/Service User Record to support integrated working;
- Data warehouse functionality to improve the provision of clinical information and reporting;
- Electronic correspondence and information sharing, including test requesting/reporting;
- Provision of Wi-Fi;
- Mobile working.
Key Delivery Theme Nine: Estates

Working towards delivery of Strategic Goals:

1. To provide high quality care; first time, every time, 6. To ensure that all of the Trust’s resources are used in an efficient and sustainable way and 7. To raise awareness within the Trust and externally of the impact that our work has on people and our environment, and take steps to reduce any negative effects.

The Trust has a very complex and diverse Estates portfolio, working out of over 360 different sites across Dorset. This is further complicated by legacy issues resulting from this estate portfolio having historically belonged to at least three different organisations.

The Trust has spent the last year building a robust Estates Team to manage these issues, and 2015/16 will see a programme of work being undertaken to address some of the long term problems of the past.

One of the key pieces of work in early 2015/16 is the development of an Estates Strategy. This strategy will reflect the new clinical models and ways of working that are described within the Five Year Forward View as well as any service rationalisation arising from the Dorset Clinical Services Review. The Estates Strategy will define the Trust’s estates objectives for the next five years.

In 2015/16 the Trust priority will be a review of Estates utilisation, with a view to rationalising use while meeting the requirements of service development. This work needs to support the development of integrated locality working, with estates plans being put in place around each of the thirteen localities.

Examples of work in this area include:

- The identification of an estates solution within the work taking place on developing new clinical models within the Weymouth and Dorset project; and also in building on the consensus reached within the Purbeck Project;
- Within the East Bournemouth locality, working with GPs and others to explore the innovative development of community facilities in Boscombe across a range of different partnerships;
- Work with clinical teams to redesign the Trust’s community hospitals, building on the work to redefine the role and function of these facilities.

During this year business cases will be developed for the development of the Psychiatric Intensive Care Unit (PICU) and the replacement of Chalbury Ward, for re-profiling the use of Trust Headquarters, and work will be undertaken to define the future of the St Ann’s site.

To help manage these diverse workstreams over the year the Trust will be looking for external partners to find innovative ways of developing the Trust’s portfolio over the next five years.

Another key target for the Trust will be around Carbon Reduction. Based on the output from the Trust’s Sustainable Development Management Plan (SDMP) there is a requirement to reduce carbon emissions by 34% by 2020 from a 1990 baseline. An outline business case will be produced by December 2015 to identify the options for reducing the Trust’s carbon footprint and improving the energy efficiency of its buildings.
Our normal day-to-day business, alongside our savings plans for 2015/16, would leave us with a surplus of £2.3m. However we plan to invest an additional £4.5m strategically, into initiatives including governance; organisational development; human resources; communications; the pump-priming of new service models; and mental health clinical systems and IM&T developments, resulting in a planned deficit of £2.2m.

The key cost drivers in the plan are:

- strategic investments;
- cost pressures;
- increases in pay costs including employer pension increases;
- non-pay inflation;
- projected impairment costs.

These costs will be bridged by:

- our 2015/16 funding settlement with Dorset CCG including the return of the ‘tariff deflator’ (the nationally determined reduction in NHS payment levels); some funding for cost pressures and retention of non-recurrent expenditure slippage;
- our Cost Improvement Programme;
- the use of reserves.

Financial Pressures

Major financial pressures arising from business-as-usual are:

- a planned aggregate deflator of 0.2%;
- increased pay costs including pay awards, increment costs and employer pension increases, equating to 2.1%;
- non-pay inflation averaging a 2.1% increase.

Changes in income and expenditure

Our main sources of income are clinical contracts with Dorset Clinical Commissioning Group; with NHS England for specialist services, prison healthcare, and some public health services; and with Dorset County Council for Public Health.

These contracts are ‘block’ contracts, where activity changes within services have little impact upon planned income streams. Contract variations during the year for new or decommissioned services will impact on income receipts, but the impact cannot be fully anticipated in advance.

We know there will be disinvestment of £570,000 by Dorset County Council Public Health from our smoking cessation service where the contract ended on 31 March 2015, and...
disinvestment of £1.1m by NHS England from the community dental service. The sexual health services element of the Dorset County Council public health contract is subject to re-tender during 2015/16.

No service changes from the Clinical Services Review in Dorset are assumed in our 2015/16 financial plan.

An additional £2m has been provided by Dorset CCG to develop the following services, in line with national requirements for access and waiting times:

- street triage;
- 7 day working by community mental health teams;
- a 24/7 crisis line;
- improving Early Intervention Service and Steps to Wellbeing waiting times;
- developing Steps to Wellbeing service for people with long term conditions;
- CAMHS developments.

Our income plans also include some non-recurrent funding from Dorset CCG towards Trust cost pressures.

Expenditure plans include the use of £3m for cost pressures including the costs of mental health placements outside Dorset and increased staffing levels.

Increased capital charges (depreciation and Public Dividend Capital) result from capital expenditure in 2014/15 and capital expenditure plans in 2015/16. Impairment costs mainly relate to our St Ann’s development and Westminster Hospital co-location work.

### Cost improvement programme

The planned Cost Improvement Programme totals £6.1m:

<table>
<thead>
<tr>
<th>Scheme</th>
<th>£m</th>
</tr>
</thead>
<tbody>
<tr>
<td>schemes carried forward from 2014/15</td>
<td>0.7</td>
</tr>
<tr>
<td>a vacancy review and adjustment including re-basing budgets</td>
<td>2.0</td>
</tr>
<tr>
<td>better procurement and reduced use of agency</td>
<td>2.0</td>
</tr>
<tr>
<td>increased productivity</td>
<td>0.5</td>
</tr>
<tr>
<td>improved procurement and contract management</td>
<td>0.3</td>
</tr>
<tr>
<td>tenancy agreement disposal</td>
<td>0.1</td>
</tr>
<tr>
<td>facilities management</td>
<td>0.5</td>
</tr>
</tbody>
</table>

Further productivity increases are planned for next year, bringing the total value of the programme to £7.6m.

### Capital plans

The planned capital programme for 2015/16 totals £10.2m. The breakdown is as follows:

<table>
<thead>
<tr>
<th>Scheme</th>
<th>£m</th>
</tr>
</thead>
<tbody>
<tr>
<td>backlog maintenance</td>
<td>2.1</td>
</tr>
<tr>
<td>compliance with legislation regarding waste areas</td>
<td>0.1</td>
</tr>
<tr>
<td>other works including ward upgrades and co-location projects</td>
<td>4.9</td>
</tr>
<tr>
<td>IT equipment</td>
<td>1.4</td>
</tr>
<tr>
<td>medical and other equipment</td>
<td>1.7</td>
</tr>
</tbody>
</table>

The ongoing maintenance, equipment and IT programme is financed from ‘in-year’ depreciation funding. The investment in St Ann’s ward upgrades are funded from cash reserves intended for capital investments.

### Risk ratings

We have considered risks to the delivery of the financial plan:

- ability to recruit and retain staff and thereby reducing agency costs;
- the number of patients to be cared for outside Dorset;
- a potential loss of income including substance misuse contracts moving to cost per case; the sexual health services contract;
- non-achievement of CQUIN targets;
- non-achievement of planned savings;
- increases in investment identified from the CQC inspection;
- costs associated with preparation or any early service changes arising from the Clinical Services Review.

We have plans in place to manage this risk including the use of the contingency funding and deferring expenditure on new projects.

Financial plans for the longer term are much less certain as the impact of the Dorset Clinical Services Review is not yet known. The Trust will consider the outcomes from the Review as they become known, to enable financial modelling to be undertaken.
How we will know if we have achieved our Strategic Goals

To monitor the Trust’s success in delivering against its Strategic Goals, the Trust is proposing to use “the Stages of Excellence” methodology. This is where the organisation defines what excellence looks like against each of its Strategic Goals and then measures progress in delivery against this statement.

The Trust is currently defining what excellence looks like against all seven of its Strategic Goals as well as defining what evidence of success it will use to determine whether the Trust has made progress or not in delivery against each of its goals. The Trust then plans to assess its performance against delivery annually around September, so that this information can feed into the Trust’s annual planning rounds.

A separate document is being prepared that will describe in detail how this process will work and once approved by the Trust Board will be published on the Trust website along with this document.

What next

Over the next year we will be holding a number of engagement events with our patients and service users as well as our staff.

The key aim of these events will be to gain feedback and comments regarding our strategic goals as well as our Annual Plan.

Dates and venues of these events will be published thought the year.

This feedback will help us refresh our Strategic Goals and inform the development of our 2016/17 Annual Plan ensuring that both are reacting to the changing world around us as well helping use all to become “Better Every Day”.

Better Every Day