Reviewing the corporate services CIP opportunity list

Corporate services productivity programme

June 2018

Reviewing the opportunities: output (1/1)

Should you choose to follow our suggested approach, we have extracted Sections 3 and 5 of the Corporate services CIP opportunity list so that you can populate these while you review the opportunities in Section 4.

Our approach will assist your review by allowing you to produce a summary output table to score and prioritise each opportunity.

You can then review at a glance those areas that might require focus (see the example on following page).

Reviewing the opportunities: output (2/2)

Example summary output table

Ref	Function	Scheme	High Priority	Low Priority	1	2	3	4	N/A	RAG
F1	Finance	Simplify chart of accounts		✓			✓			
F2		Implement a robust journal policy		✓			✓			
F3		Consolidating the level at which budget holder support is provided	✓		✓					
F4		Accounts payable automation and e-invoicing to accelerate invoice processing and approval time		✓			✓			
F5		Sharing ledger cost with other neighbouring trusts and renegotiating with the vendor	✓		✓					
F6		Enforcing compliance with policies and procedures		✓				✓		
F7		Review financial reporting ability and systems		✓			✓			
HR1	HR	Review spending in learning & development	✓		✓					
HR2		Review learning & development catalogue		✓			✓			
HR3		Roll-out of ESR self-service	✓		✓					
HR4		Roll-out of alternative systems in recruitment	✓		✓					
HR5		Self-service and intranet refresh	✓			✓				
HR6		Review of occupational health against demand and forecast		✓	✓					
HR7		Implement e-rostering for A&C staff		✓				✓		
HR8		Review policies		✓			✓			
P1	Payroll	Introduce e-forms for all payroll input data		✓			✓			
P2		Introduce e-payslips for viewing and personal payroll account to view information		✓				✓		
P3		Move to e-expenses		✓	✓					

Populating the summary output table

Creating a summary output table

You should consider each of the 37 opportunities outlined in the pack, self-assessing your trust's progress against each.

A straightforward scoring mechanism has been developed so that all the opportunities can be scored using one of:

1. **Not considered or currently considering:** the opportunity has not been considered to date, or is under consideration.
2. **Attempted, not delivered:** our attempt to deliver this opportunity has been unsuccessful.
3. **Plan to deliver:** we have a plan to deliver this opportunity.
4. **Delivered:** we have successfully delivered this opportunity.

The 'summary output table' should be populated by putting a 'tick' (✓) in the relevant scoring box for all opportunities, then formatting the final RAG column to show the colour (red, red–amber, amber–green or green).

Prioritisation of opportunities

Cost improvement plans relating to corporate services remain a small part of a trust's overall CIP plans. Based on the experience of NHS Improvement, each scheme should be carefully considered by all trusts, including consideration of the potential benefit for effort exercised.

The summary output table has two columns in which trusts can enter their view of whether each scheme is considered to be a 'high' or 'low' priority.

A process should be included in the trust's annual CIP planning cycle for an annual refresh and review, as low priority schemes can increase in importance in later years.

Using the summary output table

The assessed list of opportunities in the summary output table can be the basis for considering opportunities and prioritising their inclusion in your trust's list of 2018/19 CIP opportunities. The table also provides the executive team with an 'at a glance' view of the prioritised opportunities based on the self-assessment.

For the test trusts we observed that even where an opportunity was marked as 'green' (delivered), revisiting the original plan and assessing whether the planned benefits had been delivered sometimes resulted in trusts deciding to augment delivery to meet the original plan or to deliver more ahead of plan.

The test trusts tended to investigate all opportunities assessed as anything other than 'green'. We suggest that all trusts do this where capacity allows, to maximise the potential benefits from undertaking the assessment.

Summary output table (1/3)

Ref	Function	Scheme	High priority	Low priority	1	2	3	4	N/A	RAG
F1	Finance	Simplify chart of accounts								
F2		Implement a robust journal policy								
F3		Consolidating the level at which budget holder support is provided								
F4		Accounts payable automation and e-invoicing to accelerate invoice processing and approval time								
F5		Sharing ledger cost with other neighbouring trusts and renegotiating with the vendor								
F6		Enforcing compliance with policies and procedures								
F7		Review financial reporting ability and systems								
HR1	HR	Review spending in learning and development								
HR2		Review learning and development catalogue								
HR3		Roll-out of ESR self-service								
HR4		Roll-out of alternative systems in recruitment								
HR5		Self-service and intranet refresh								
HR6		Review of occupational health against demand and forecast								
HR7		Implement e-rostering for AfC staff								
HR8		Review policies								
P1	Payroll	Introduce e-forms for all payroll input data								
P2		Introduce e-payslips for viewing and personal payroll account to view information								
P3		Move to e-expenses								

Summary output table (2/3)

RAG key

1. Not considered, or currently considering	
2. Attempted, not delivered	
3. Plan to deliver	
4. Delivered	

Ref	Function	Scheme	High priority	Low priority	1	2	3	4	N/A	RAG
P4		Mandate use of all ESR modules available								
I1	Informatics	External hosting								
I2		Direct a shift from calls and emails to web forms to access support								
I3		Capitalisation of project posts								
I4		Commoditise technical solutions and review partnership options								
I5		Review licences and contracts for software and services								
I6		Team consolidation								
I7		Annual review of all contracts alongside performance review of value for money								
L1	Legal	Provide a single point of contact/authorisation for queries to be passed to external legal advisors								
L2		Develop a frequently asked questions (FAQs) reference point to help reduce avoidable contacts to legal								
L3		Standardise operating procedures to collaborate across regional or national footprint								
L4		Contract reviews								

Summary output table (3/3)

Ref	Function	Scheme	High priority	Low priority	1	2	3	4	N/A	RAG
PR1	Procurement	Centralise all procurement roles								
PR2		Create an integrated procurement and contract management function management								
PR3		Clinical procurement specialist								
PR4		Widening access to and adoption of e-catalogues								
PR5		Adoption of electronic P2P solutions								
PR6		Expanded use of e-tendering								
G1	Governance and risk	Sharing of complaints, clinical governance, health and safety and fire officers across partner organisations								

Results and feedback submission

Your results and feedback

Please let us know if this is useful by sending your completed summary output table along with any feedback to nhsi.corpservices@nhs.net.

Our thanks

We are grateful to the test trusts with whom we have worked to develop this document. Your frank and honest feedback has helped us to shape the output, and we hope to continue our work with you now that you are in receipt of your benchmarking report.

We are also grateful to our delivery partners, other contributing organisations and individuals for the time you have taken in supporting this work.

Contact us:

NHS Improvement

Wellington House,

133-155 Waterloo Road,

London,

SE1 8UG

0300 123 2257

enquiries@improvement.nhs.uk

improvement.nhs.uk

@NHSImprovement

This publication can be made available in a number of other formats on request.