



Cheshire and Wirral Partnership



NHS Foundation Trust

Strategic Plan Summary 2014/2019

Cheshire and Wirral Partnership
NHS Foundation Trust



#CWPZeroHarm



1. Declaration of Sustainability

As set out in this five year strategic plan, Cheshire and Wirral Partnership NHS Foundation Trust (CWP) is committed to developing and delivering high quality, safe and sustainable services.

CWP will provide a key role in partnership working to bring providers together so that care is person-centred and is based in local communities. This will mean empowering and educating patients, service users and carers to make informed decisions about their health, developing services that have the patient at the centre of the care process and developing integrated services that deliver the right care, first time.

To ensure the sustainability of CWP, the Trust has developed a strategic approach, informed and driven by the needs of the population and the constrained financial position over the coming years of this plan. We are aware that over the next 10 years the populations of the areas within the geographical footprint of the Trust are expected to increase, particularly amongst those aged over 65 years, and to a slightly lesser extent, those over 85 years. As a result, demand for services is changing, particularly around long-term conditions, and this is likely to continue to do so in light of the demographic changes.

The Trust's strategic direction for the coming five years has two key approaches - our approach to quality through our Zero Harm strategy and our approach to integration. These are underpinned by five key strategic enablers, which are a mix of internally led transformation programmes and the external transformation programmes in which CWP is playing a key role. These include the development of innovative contractual models between all providers to support the delivery and management of the shift from care in hospital to more appropriate settings in order to provide more sustainable services.

These approaches build upon the locality clinical strategies which formed the basis of our Operational Plan 2014/16 and have been developed in response to the complex operating environment, the local transformation agenda, and the key drivers for change on a national, local and internal basis.

The financial strategy of the Trust is to ensure that it remains a viable Foundation Trust as a going concern so that sustainable, high quality and effective services can continue to be delivered. The strategy supports and underpins the clinical service strategies and the efficiency requirements that are needed as a result of the NHS income the Trust receives, and is dedicated to providing investment in innovation and quality where required. It also seeks to cover and mitigate risks where they are known.

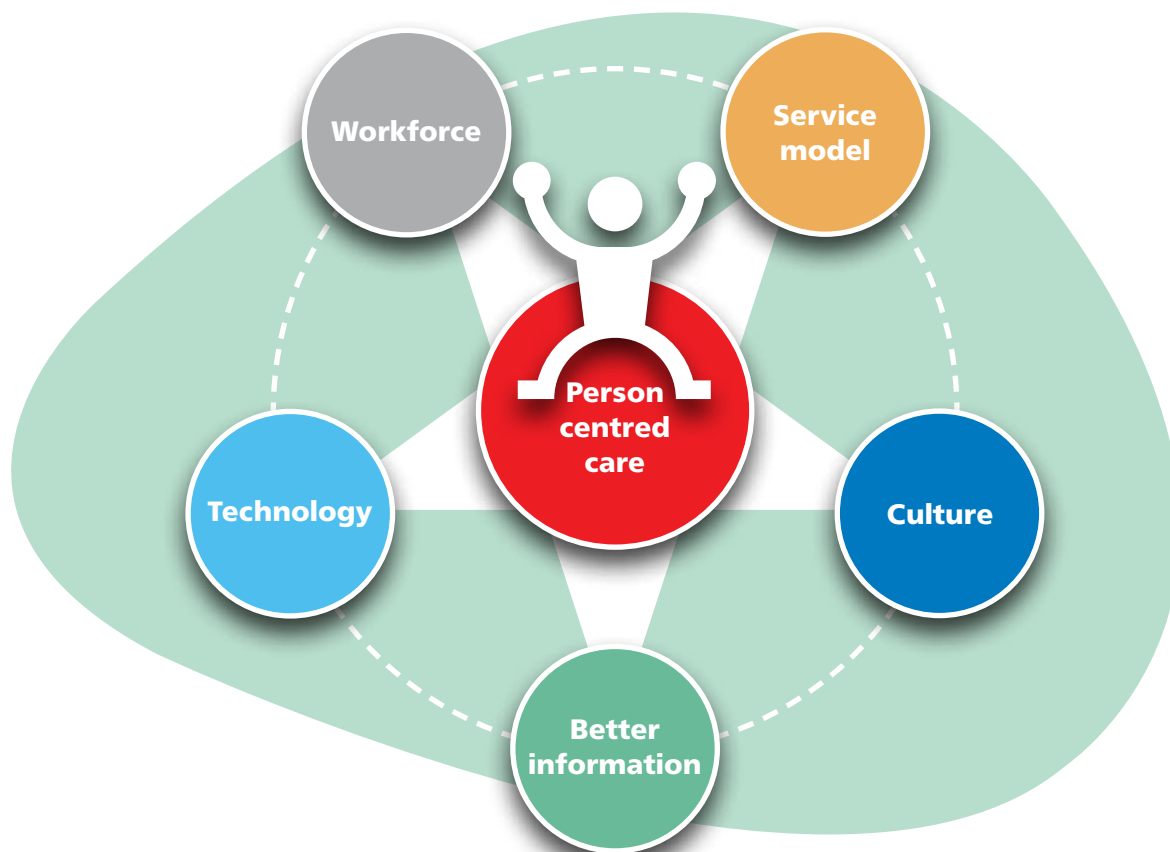
2. CWP Vision

Cheshire and Wirral Partnership NHS Foundation Trust (CWP) provides a range of both mental health and physical health services. These include community based physical health care services in western Cheshire, inpatient and community mental health services for adults and children, learning disability and drug and alcohol services within Cheshire, Wirral and neighbouring areas. The Trust also provides a range of specialist services within Liverpool, Bolton, Warrington, Halton and Trafford.

The Trust operates across a large geographical footprint covering three local authority areas, five CCGs and four acute trusts making the strategic framework in which the Trust operates complex. This is the result of the significant financial and demographic challenges faced in all localities, the Trust's large geographical footprint and the complex commissioning framework in place.

The Trust's ongoing strategic vision of 'Leading in partnership to improve health and well-being by providing high quality care' reflects the continued emphasis on the local move towards integrated working and the development of collaborative partnerships to deliver patient-centred services. It also highlights the key role the Trust is playing as one of the main providers of care in the integrated care pioneer programme, reflecting the Trust's involvement in shared commitments within the footprint.

Service transformation



To achieve our ambition, the Trust has 7 strategic objectives which underpin and drive our vision:

- 1.** Deliver high quality, integrated and innovative services that improve outcomes.
- 2.** Ensure meaningful involvement of service users, carers, staff and the wider community.
- 3.** Be a model employer and have a caring, competent and motivated workforce.
- 4.** Maintain and develop robust partnerships with existing and potential new stakeholders.
- 5.** Improve quality of information to improve service delivery, evaluation and planning.
- 6.** Sustain financial viability and deliver value for money.
- 7.** Be recognised as an open, progressive organisation that is about care, well-being and partnership.

Our fundamental priority is to ensure that the population we serve receives high quality, safe, effective, compassionate and recovery orientated services that value the expertise of service users and carers themselves.

In response to learning from the Francis public inquiry and supplementary reports, the Trust adopted the Department of Health's 6Cs (Care, Compassion, Competence, Communication, Courage and Commitment) as our Trust values in June 2013. This reflects our clear commitment to delivering, which means focusing on enabling people to be the best that they can be.

The 6Cs demonstrate the Trust's emphasis on the quality of services for patients and carers and highlight the qualities that the Trust looks for in its staff. We have been developing initiatives to ensure that the 6Cs are embedded in all that we do.

We want the 6Cs to define what it feels like to work and receive care from the Trust. They are applicable to everyone associated with the organisation, patients, service users, carers and staff alike.

The 6Cs embody a set of behaviours to enable cultural change and underpin the Trust's drive towards a continuous improvement culture which is described in more detail later in this plan. The Trust is encouraging staff to understand their individual responsibilities to embody these values in professional practice and in their everyday roles via a collective responsibility agreement.

The collective responsibility agreement is made up of individual contributions by way of expected behaviours of all staff at CWP that will ensure that individually and collectively we can be the best that we can be.



Continuing to work closely with our governors and members is also important to the Trust. Our improved approach to enabling governors to influence Trust plans has given greater opportunity for the Trust to understand the views of our members and the public and we will continue to build on this approach moving forward.

3. Local Health Economy and Operating Context

The Cheshire and Wirral population and Health and Well-being factors

Over the next 10 years the populations of the areas within the geographical footprint of the Trust are expected to increase, particularly amongst those aged over 65 years. Changing lifestyle behaviours such as smoking, increasing weight and drinking are also impacting on the need and demand for care services.

The increases in these population groups means that there is now a greater older age structure in these areas than nationally. The population is predominately older than the national average, creating a challenge as to how we can respond to these people's needs so that we enable them to enjoy the best quality of life that they can.

Across the Trust footprint, mental health conditions such as depression are significant health problems affecting a sizeable number of people. The number of people diagnosed with dementia is also increasing and as the numbers of older people increase, this trend is expected to continue.

Across Cheshire and Wirral, there are wide variations in life expectancy among population groups with some being well below the national average. Some of the main health and well-being problems are being caused by people's lifestyle choices including smoking, drinking alcohol, a lack of exercise and poor diet. There are also relatively high numbers of excess deaths of adults with serious mental illness.

Operating Context

The strategic framework in which the Trust operates is complex. This results from the significant financial and demographic challenges faced in all localities, the Trust's large geographical footprint and the complex commissioning framework in place. Despite this, there is agreement amongst all stakeholders of the scale of the challenges. The Trust continues to maintain its good relationships with local commissioners and other providers and is playing an integral role in the local drive towards integrated working and developing collaborative partnerships to deliver services.

A number of drivers and issues are shaping the strategic context. The current constrained financial environment means that commissioners will not be able to afford current levels of activity across all providers going forward. Growth will need to be contained within available financial envelopes, if not in some cases significantly reduced. At the same time, requirements of quality, safety and care must be maintained in line with regulatory changes and key recommendations within recent reports including the Francis, Berwick, Winterbourne View and Lord Bradley reports.

In addition there is a continued focus on measuring and capturing patient and public feedback about their experiences and involving carers, the public and patients in planning services and service changes.

A key strategic challenge for CWP is to continue to address the issues around closing the gap between mental and physical health services to achieve parity. To us, parity means people having access to services which enables them to maintain their physical and mental well-being. People with mental health conditions generally have a significantly different level of contact with physical health services compared with other patients and challenges remain in putting mental health on par with physical health.

In response to the cross Cheshire challenges, the local stakeholders including local authorities, CCGs and providers (including CWP), overseen by the health and well-being boards, have successfully attained Integrated Pioneer Status. This programme aims to provide an improved standard of health and well-being through the delivery of new models of care, and focuses on providing for those with long term conditions and for families with complex needs, as well as for those whose needs are not currently well provided for.

CWP has played a key role as one of the main providers of care in the development of the pioneer bid and continues to undertake a central role in the integrated care pioneer programme, reflecting the Trust's involvement in shared commitments within the footprint.

Underpinning the pioneer programme across Cheshire are three large scale transformational programmes - 'West Cheshire Way', 'Connecting Care' in Central Cheshire and 'Caring Together' in East Cheshire. Similarly in Wirral, a transformation programme entitled 'Vision 2018' is driving forward strategies in response to the local challenges in which the Trust is playing a key role in progressing.

Partnership working with third sector, voluntary and other organisations will be the vehicle to develop services and innovate, along with capitalising on the locality model within CWP. This is as well as relocating service provision into community settings and ensuring that robust pathways to voluntary and other organisations with strong user led initiatives are developed.

The most significant element of all the transformation programmes focuses on initiatives to reduce the demand on the acute hospitals in line with The NHS Outcomes Framework, and to invest in meeting demand, improving quality and securing sustainable change.

The transformational programmes running across the Trust footprint described above have also been the forums in which partner organisations have discussed the Better Care Fund proposals. In the main this has been seen as a vehicle to support and enhance the work that was already underway, and in particular to support the development of a whole person, multi-agency approach for the care of patients and service users in the most appropriate setting.

Trust wide, CWP has a number of challenges primarily around maintaining the balance between ensuring quality and access to services while ensuring services are provided within the cost envelope, delivering higher quality care and service improvements. With the emphasis and drive towards large-scale transformation, the development of effective long term joint plans, including cost improvement programmes (CIP) is crucial.

Particularly important to the Trust is maintaining its position as a preferred provider of services, and ensuring that there is capacity and scope within the Trust to continue to deliver high quality services, to develop innovative services, and to identify new opportunities to enhance sustainability.

Our initial competitor analysis suggests that the proximity of competitors and the developing agenda on patient choice could potentially be seen as threats to some Trust services. Our strong financial position, reputation, strength of governance and specialist knowledge and expertise will aid the development of our strategic options and partnership working.

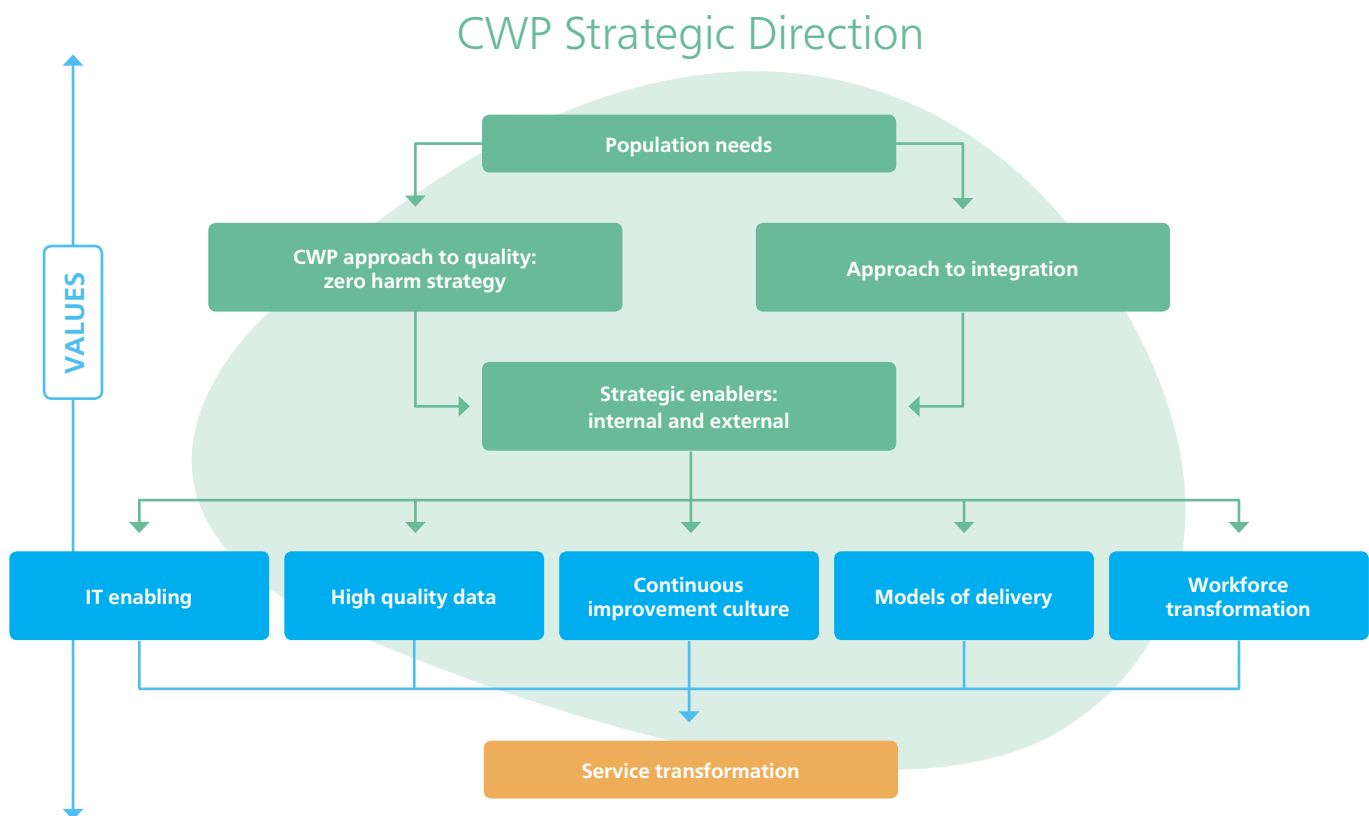
By adopting a person centered approach, we believe we will be well placed to be the provider of choice for our services across Wirral and Cheshire and will minimise the potential impact of the introduction of personal budgets.

4. CWP Strategic Direction and Plans

The Trust operates in a diverse and challenging environment supporting a range of communities and their differing needs and working closely with stakeholders in each of the different health economies to develop sustainable services. Whilst there is an expected level of variation between their approaches, their core the focus has been on:

- Empowering and educating patients, service users and carers to make informed decisions about their health.
- Developing services that have the patient at the centre of the care process.
- Developing integrated services that deliver the right care, first time.

Our approach to developing the CWP strategy is summarised in the following diagram:



This approach builds upon the locality clinical strategies which formed the basis of our Operational Plan 2014/16 that have been developed in response to the complex operating environment, the local transformation agenda, and the key drivers for change on a national, local and internal basis. The clinical strategies for CWP West, CWP East and CWP Wirral are included in full in our Operational Plan 2014/16.

5. Approach to Quality: Zero Harm Strategy

The Trust responded to the Berwick review of patient safety in the NHS in England by appointing a Clinical Expert Champion for Zero Harm. The champion subsequently developed proposals to help the Trust in making choices to help develop and deliver the right tactical steps towards the strategic goal of having an aspiration of zero harm that drives the Trust culture, defining the Trust's quality strategy for the next three to five years.

The Trust recognises that major cultural change is required to continuously improve quality and patient safety and it is only through continuous improvement of systems that the Trust will make a difference in the quality of health and health care.

The aspiration of zero harm that drives the Trust culture through the delivery of its quality strategy involves:

- Moving from process orientated reporting to outcome orientated reporting with a focus on recovery.
- Increasing skills and capacity to intelligently analyse data at team, service and Trust-wide levels.
- Promoting what good quality healthcare looks like in each service and celebrating success in delivering good outcomes.

To achieve the zero harm aspiration that drives the Trust culture requires a commitment to have a longer term quality strategy and as such, the Board of Directors has committed to ensuring that its quality goals, as set through the Quality Account process, remain unchanged for at least the next three years. During that time, there will be an expectation of continuous improvement of systems for the quality of health and health care. The quality plans are:

Patient Safety: to achieve a continuous reduction in avoidable harm and make measurable progress to embed a culture of patient safety in CWP, including through improved reporting of incidents.

This quality priority reflects the Trust's strategic goal of having an aspiration of 'zero harm' that drives the Trust's culture.

Clinical Effectiveness: to achieve a continuous improvement in health outcomes for people using the Trust's services by engaging staff to improve and innovate.

This quality priority reflects one of the Trust's strategic goals of delivering high quality, integrated and innovative services that improve outcomes. This quality priority aims to ensure that systems within the Trust promote, support and facilitate delivery of best practice day-to-day and learn from outcomes, whether positive or adverse, to ensure that service delivery consistently delivers best practice.

Patient Experience: to achieve a continuous improvement in people's experience of healthcare by promoting the highest standards of caring through implementation of the Trust's values.

Ensuring that people have a positive experience of care is one of the Government's ambitions for the health service for 2014/15. Also, one of the indicators of the Trust's strategic goal of having an aspiration of zero harm that drives the Trust's culture is the prevention of unacceptable variations in healthcare experience and ensuring that compassionate care and patient experience is viewed as equally as important as clinical care.

6. Approach to Integration

CWP are committed to taking an integrated approach to planning and service delivery enabling patients, service users and carers to access effective, efficient and well-coordinated care services thereby improving outcomes for users and the experience of using services.

The Trust also recognises that changes to systems, processes and structures alone cannot deliver integration and its benefits as the quality of leadership, vision, communication and behaviours in partnerships are also all critical factors to success.

The Trust identifies three key dimensions to achieve integration. These are:

- Partnership integration between individual staff members and the person accessing services.
- Horizontal integration between health and social care services.
- Vertical integration to avoid care fragmentation.

By adopting a person-centred approach, we believe we will be well placed to be the provider of choice for our services across Wirral and Cheshire and will minimise the potential impact of the introduction of personal budgets.

7. Strategic Enablers

The extent of the external and internal challenges means there are varying impacts and risks to sustainability for the key services provided by the Trust. The success of our strategic plans is reliant on an effective infrastructure and enablers to underpin the delivery of safe, effective and patient centred care. Our key strategic enablers are as follows:

IT Enabled Service Transformation

The Trust is planning a significant change to the way in which IT systems support clinical services. Our plans will mean that work for our community staff will be designed and delivered around the needs of the patient, with remote access to clinical and administrative systems enabling staff to be able to plan their visits more around the requirements of the patient.

This will be facilitated through the use of agile working solutions. There will be a significant move from the traditional 9-5 working pattern with staff contracted to work 37.5 hours over a seven day period.

Our aim is to be 'paper light' by 2018. The achievement of this requirement will only be achieved through the adoption of new ways of working supported by technological solutions brought about through the IT Enabled Services Transformation Programme.

Data Quality

The Trust's quality strategy has described plans to better use data and information by increasing skills and capacity to intelligently analyse data at team, service and Trust-wide levels. This will facilitate the identification of variance – promoting positive variance and reducing or eliminating harmful or inefficient and unnecessary variance.

Skills and capacity to undertake intelligent interrogation and analysis of data to check for variance and normalised deviance, as well as looking at what works well, is a main component of the quality strategy to enable the Trust to work towards achieving a zero harm culture.

In 2014/15 we have begun to review our performance management processes to support decision making and the identification of areas of risk to the delivery of plans. This includes the development of appropriate and meaningful performance dashboards at team, services, locality and Trust Board levels.

Continuous Improvement Culture

There is local evidence from complaints and incident reviews demonstrating variations in health care experience, despite investigation, best intentioned action planning and the hard work of individual frontline staff, management and governance systems.

We will support and encourage our staff to innovate and develop new and improved ways of working. Starting in 2014, we will launch a scheme to incentivise innovation and help create the time for individuals and teams to progress new ideas, embed them in practice and where appropriate take those to external markets.

Our approach to continuous improvement will also encourage individuals and teams to review their practice and identify any areas of duplication and waste. The Trust will support the elimination of their balancing the need to ensure capacity is available to meet patient need (as identified with commissioners) and the financial parameters that the Trust has to operate within.

Through continuous improvement we will:

- Improve staff morale and reduce staff sickness.
- Staff will have greater job satisfaction and therefore CWP will be seen as a desirable place to work, attracting the highest calibre of staff.
- Reduce and remove tasks that add no value to a patient pathway or process.
- Increase our capacity by realising time by removing unnecessary work.
- Make better use of our resources as we understand what really needs to be done.

Workforce Transformation

A significant challenge for the Trust moving forward is ensuring that the workforce is appropriately skilled and flexible enough to respond to changes in service delivery, particularly in light of the drive towards more community based services and multidisciplinary, integrated teams. The skills of the workforce must also be closely aligned to the needs of patients, service users and carers.

Our assessment of the required needs of the Trust around staffing identifies that with community-based service provision being enhanced, a reduction in the number of in-patient beds for service users with less complex conditions and the increased need for partnership working, changes to staffing numbers, skill mix, and the skills and roles required will see a shift in the workforce profile.

Ensuring that the Trust is ready to respond to the changing operating environment and the integration agenda is crucial. As such, the Trust has undertaken some reconfiguration and modernisation of certain roles in light of the fact that the workforce of the future will be heavily reliant on highly trained and focused clinical roles.

As set out in our Operational Plan 2014/16, the broader workforce priorities of the Trust include building clinical and managerial leadership capacity by improving the skills of existing managers and by identifying and offering developmental opportunities and coaching to future managers.

The Trust is also embedding values and social responsibility through the Trust's commitment to its social responsibilities around offering apprenticeship schemes and supporting unemployment schemes to widen access to employment.

Models of Delivery

In addition to the continuous improvement strategy within the Trust, CWP will build upon the successful work to date to further develop partnership working with stakeholders and other providers across our different health economies. CWP believes that only by working together on meeting the needs of the population we care for can we increase our sustainability against the challenges services face.

With the level of risk and challenge in the health and wider care system, we anticipate that the level of partnership working and maturity will gather pace. This will increasingly involve a wider range of providers including the third sector. Across the period of this strategy a number of our services, particularly our more specialised services, will develop 'buddying' or federation type of relationships.

We believe we have a number of services that have a strong regional and national reputation that would be strengthened further by working with similar partners across the country. In addition, there are a number of models underway that are looking to optimise services along their pathways.

In order to progress these models, the Trust will continue to build strategic partnerships with commissioners and other providers.

The transfer of resources from health to local authorities' public health and the Better Care Fund drives us very positively towards collaborative commissioning and delivery of care.

Each of our localities has a slightly variable approach which presents different opportunities and priorities. The CWP locality structure, with the added Trust-wide resources and infrastructure, presents CWP with the opportunity to develop services and partnerships at a local level and also at a wider level as appropriate.

8. Strategic Options and Service Transformation

The Trust will develop and deliver services within the context of the approach to quality and integration and the key strategic enablers as set out in this plan. An example of this is the work the Trust has undertaken to review its inpatient services and safe staffing levels in line with the requirements of the National Quality Board. Work is now ongoing to implement the recommendations of the review, alongside the programme of continuous improvement described earlier, focusing on practice and cultural issues, closely linked into the review of inpatient provision underway as one of the Trust's strategic enablers.

9. Clinical Risks and Challenges to Sustainability

The Trust's strategic risks are managed by the corporate assurance framework. This includes the Trust's clinical risks. The risk treatment plans are in place to ensure that there is appropriate risk reduction and mitigations in place. The Trust has a number of current clinical risks which have appropriate mitigations and risk treatment plans in place. These are detailed in the Operational Plan 2014/16.

Examples of key current clinical risks, which have not yet been fully mitigated to their target risk score and therefore are subject to a longer term risk treatment plan, include:

- Risk of harm to patients due to a lack of staff competency to manage changing physical conditions.
- Risk of harm to patients as a result of increased rate of grade 3/4 pressure ulcers being reported and evidence of recurring themes in RCA reports relating to pressure area care.
- Adults, children and young people are not protected through safeguarding training and practice.

- Risk of harm to patients due to Clinical Assessment of Risk to Self and Others (CARSO) risk assessment not being completed as per policy.

As part of the Trust's planning cycle, it has recognised the need for sound strategic planning for clinical sustainability to assure the delivery of good quality care to patients. In addition to the Trust's current strategic risks, the Board has considered how it intends to ensure appropriate, high quality and cost-effective services for patients on a sustainable basis, and in doing so has agreed to scope the following clinical risks:

- **Fragmentation of commissioning leading to fragmented patient pathways.**

The Trust intends to identify controls and assurances, including through discussion and engagement with its commissioners and partner organisations, to minimise the impacts of this challenge on quality across key, complex patient pathways across populations.

- **Capacity of workforce and skills to respond to emerging and new models of care provision and evidence based interventions.**

The Trust intends to identify controls and assurances, including through discussion and engagement with its commissioners and partner organisations including educational institutions and training providers, to minimise the impacts of this challenge of delivering high quality and clinically effective care and treatment in accordance with emerging and new models of care and rapidly changing evidence bases.

- **Income risks associated with the current market environment and the potential for commissioners to seek further competitive tendering for clinical services.**

The financial strategy of the Trust will ensure that it remains a viable and sustainable foundation Trust as a going concern, so that new opportunities to enhance sustainability are identified and capacity/scope to deliver high quality, effective, efficient and innovative services continues to be a priority.

10. Finance and Sustainability Strategy

The financial strategy of the Trust is to ensure that it remains a viable Foundation Trust as a going concern so that sustainable and effective services can continue to be delivered. The strategy supports and underpins the clinical service strategies and the efficiency requirements that are needed as a result of the NHS income the Trust receives, and to provide for investment in innovation and quality where required. It also seeks to cover risks where they are known.

The strategy reflects very much the same principles that have been in place and have been defined by ongoing discussion by the Trust's Board since the organisation was authorised by Monitor and pays due regard to the financial and compliance framework, the key financial risks faced by the Trust and puts into place appropriate mitigation.

The Trust has continued to maintain its strong position as a provider of high quality value for money services against a continued backdrop of financial, legislative and commissioning changes. The Trust ended 2013/14 with a surplus of £1.8m and a Continuity of Services Risk Rating of 4.

The general principles that the Trust continues to work to are as follows:

1. To achieve a Continuity of Services Risk Rating of a 3 or above on aggregate over the period.
2. To apply a long-term efficiency programme that is tailored to the income profile of the Trust where all proposals are impact and risk assessed to ensure the outcome is true efficiency, delivered either by:

[a] Delivering more for the same financial value.

[b] Delivering the same service for less operating cost (the main material focus over the period of the plan).

[c] Attracting additional income in niche markets where a contribution to efficiency can be sustained (marginal over the period of the plan).

3. To cover where possible risk that is pertinent to the Trust in terms of workforce change, contract risk or any other corporate risk.
4. To utilise resources such as CQUIN payments made to the Trust to enhance and reward quality improvements in relation to the services provided for our patients.
5. To utilise the Trust's cash position to maximise effective investment in the provision of fit for purpose facilities without compromising basic good practice regarding liquidity cover for normal operations.

The key actions required to support the delivery of this strategy are as follows:

- Trust wide delivery of the reduction in operating costs as set out in the plan.
- The adherence to approved business plans where there is a shortfall on income due to contract reduction or growth in a new niche market which is being underpinned non-recurrently.
- Establishment and embedding of the performance and redesign agenda to support robust planning and delivery.

The Trust has built on the modelling undertaken in the Operational Plan 2014/16 and has robustly tested the financial model across a number of downside scenarios. In doing so, the Trust has out in place appropriate mitigations to ensure the ongoing sustainability of the Trust.



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