



DAV
management
redefining the management of change

PROGRAMME DEFINITION AND INITIATION

Defining the priorities and creating the structure and organisation to deliver a portfolio of strategic change

The Huntercombe Group (THG) is a specialist care provider providing treatment in the areas of Mental Health, Learning Difficulties, Brain Injury Rehabilitation, Neurological Care and Child and Adolescent Mental Health (CAMHS). THG has gained a reputation for innovation and for creating the right treatment solutions for patients with particularly challenging and complex needs. The group owns and operates over 35 hospitals and specialist centres located throughout England and Scotland and all services are commissioned and funded by the NHS. THG is a part of Four Seasons Health Care, although operationally distinct. The group was acquired by leading private equity firm Terra Firma in 2012 and is one of the largest independent care providers in the UK.

A new appointment

Although the Huntercombe brand was not established until 2003, the group can trace its origins back to 1990, when Scotcare opened the first independent brain injury rehabilitation centre in Scotland. Since then it has grown steadily through a number of strategic acquisitions and has constantly evolved its services to meet the growing demands of the NHS. In 2014 a new CEO, Valerie Michie was appointed to oversee the next stage of THG's development. Valerie has a successful track record in business, specialising more recently in the health sector. In her previous role as Managing Director for Serco Health, she was the driving force behind the organisation's improved reputation for both service quality and patient experience.



The period leading up to Valerie's appointment had seen considerable change in the NHS and, of particular significance, the evolution of new structures brought with it a new commissioning landscape. To meet the challenges this presented to THG, Valerie and the senior team developed a strategy to:

- Ensure that all of THG's services met needs within the population that commissioners recognised and felt confident commissioning;
- Drive ongoing adherence to necessary compliance and other regulatory requirements, and;
- Improve staff and patient satisfaction to continue improving the quality of care provided.

Key to delivering this strategy would be the introduction of changes to the business enabled by the deployment of new technology. When Valerie arrived at THG, the group was already in the process of implementing an electronic patient care record system across its acute sites and was also undertaking a project to pilot a time and attendance solution. In addition, there were plans to implement an e-compliance solution, to ensure that the organisation could assure itself of the quality and safety of its services and there were early stage plans for solutions to address requirements for referral and customer management.

These projects were in various stages of implementation – with an overall programme management approach in place at the time which was not encompassing all of the ideas that were emerging. In addition, the organisational change elements related to previous technology projects had suffered from under-investment and, as a result, implementation success was variable. The challenge facing the THG team was to understand what could be done and when, thereby creating an overall programme of technology-enabled change for the coming 12 – 24 months.

Adopting the right approach

Fortunately, this was a situation the new CEO had experienced in her previous roles and she understood the critical need to evaluate, prioritise and plan the projects required as part of a properly structured and managed programme of change. Valerie was supported in this by newly appointed Transformation Director, Caroline Lien, who became the Senior Responsible Owner (SRO) for the combined technology programme.

However, a lack of programme management capability and experience within THG meant that external support would be needed to evaluate these projects, define priorities and make recommendations that would help to shape the forward plan. Having previously worked with DAV Management (DAV), Valerie knew the programme and change management expertise the company could bring to bear and brokered an introduction to Caroline. Following a short familiarisation period, DAV was appointed to provide the specialist support that THG required.

Setting the direction of travel

DAV began working with THG in June 2015 and, with findings and recommendations due to be presented to the group's Board and investors the following September, it was clear that the assignment would need to be driven with pace. With so many initiatives to be considered, it was recognised at an early stage that some conflict between competing requirements would be inevitable. To help address this DAV placed a particular emphasis on communication, ensuring that all stakeholders were fully engaged with the process underway, knew what was required of them and were equipped to make key decisions at the required time.

The Programme Board had determined that work on the electronic patient care record system would continue with a light touch governance from the new programme structure. It was felt that this approach would ensure the solution would be implemented to time and budget across the 20 acute sites now in scope and that the anticipated business benefits would begin to flow. In parallel, the time and attendance pilot was placed on hold, pending reassessment of the business need. The referrals management and e-compliance projects were still at an early stage of evaluation and two further initiatives were added to the mix; a benefits assessment of a dedicated management information (MI) solution and the need for investment in a system for HR.

With timescales so tight, DAV needed to make inroads quickly and to facilitate this, used a tried and tested approach based on good industry practice, to drive through the initial 'discovery' phase for the new projects that were emerging. This involved a series of structured meetings and workshops with all the key stakeholders, to understand the current state of play and begin the collection of key data relating to plans, requirements, capabilities, costs and anticipated benefits.



Although an iterative phase, DAV began to build a holistic view of the work underway, whereby the relative requirements, solutions, costs and benefits of each new project could be more clearly understood and evaluated in the context of the others.

In conjunction with this, DAV began to shape the overall programme approach, building a management and organisational framework that would bring all the project work into a single governance structure and, more importantly, drive a specific focus on the outcomes of business change, rather than just IT. Working with the Transformation Director, DAV initiated a communication plan designed to raise stakeholder awareness of the business change imperative and emphasise their roles and responsibilities in delivering the outcomes that THG was seeking.

A changing landscape

As the evaluation work progressed and business cases became clearer, there were inevitable changes in requirements, triggered either by the actual findings or by new demands being placed on the business:

- The rollout of the electronic patient care record system was progressing to time and budget but the changes being introduced were not being embedded effectively and the expected benefits were not being fully realised. However, the need to continue with the implementation was recognised with a commitment to review progress at a future, agreed date.
- Thorough scoping of the e-compliance project indicated that a far more agile solution than that being considered would be required and the project was recalibrated accordingly, with the creation of a dedicated team to work with the emerging requirements.



- Emergent issues with recruitment and retention of staff turned the spotlight onto HR and greater priority was placed on the evaluation of a new solution and its associated business case, to help the business resolve these.
- Review of the requirements for referrals management indicated that, initially, a more simplistic customer management database would be sufficient and the more complex elements of this initiative were deprioritised for later evaluation.
- Analysis of the feedback from the 'on hold' time and attendance pilot showed that more development work within the solution was needed before a resumption of the pilot and subsequent rollout could be planned.
- The management information requirement was becoming clearer and it was decided that the needs could be met using the Four Seasons Healthcare management information solution that had previously been agreed.

In addition to these changes in programme scope, THG recognised that additional leadership, governance and process were required to drive the activities underway on behalf of the organisation. With no suitable internal candidates available, DAV was asked to support the definition of role and recruitment of the right individual to take the programme forward and own the THG future systems strategy. As a result and with this remit, a new THG Head of Technology Enabled Change (TEC) was appointed.

The new programme structure proposed and implemented by DAV proved to be very effective and the evaluation work undertaken within it helped THG to define a clear programme direction, enabling the group to:

- Maintain the focus on completing delivery of the electronic patient care record project to the agreed sites and identify the timescale for a subsequent review of progress.
- Gain clarity around the next steps for the time and attendance project.

- Evaluate, scope and develop business cases and agree organisational priorities, for the referrals (customer) management, e-compliance, MI and HR system initiatives that were in scope.
- Produce a coherent and costed, to a high level, transformational plan, based around the business cases for the new initiatives and focused on the delivery of business outcomes.

As with all DAV's assignments, there was an emphasis from the outset on knowledge transfer and a commitment that the programme management organisation and structure would be developed to enable a seamless hand-over to THG, for the transformation to be run in-house in the longer term. The arrival of the Head of TEC provided a focal point for the transition of programme ownership and the new appointee worked closely with DAV to facilitate this.

Gaining board approval

Much had changed by the time September 2015 came around. THG had a proposed approach to a new portfolio of projects: these were properly structured in a business change framework, within which delivery priorities were significantly different to those set earlier in the year. DAV worked with Valerie and Caroline to reflect these factors in the programme plan and business case submissions that were made to the group's Board and investors later in the month. It was a testament to all those involved that the programme proposals were extremely well received for their clarity, detail and direction and that the approval was given for continuation of the programme on this basis.

The benefits realised

With investor approval secured, THG could drive the programme forward with confidence. DAV transitioned out of its frontline role, maintaining short-term support to the new Head of TEC, whilst the programme and its re-prioritised constituent projects gained traction with the business.





Reprioritising investment in a new HR solution has enabled THG to begin addressing the challenges it is facing in staff recruitment and retention, which in turn will help to reduce staff turnover and costs. The time and attendance project has been re-aligned and, with the new developments identified and subsequent integration with the HR system, will enable an implementation plan to be developed which focuses on driving out early benefits associated with time allocation and cost control.

The decision to simplify the requirements for an initial customer management system, to be followed by a more sophisticated referrals management at a later date, now enables THG to get an integrated view of their customers across all facilities. This will be a significant step forward and combined with the improved management information capabilities being introduced and the improved availability of data from the other operational systems, will mean that, for the first time, Valerie and her team will be able to drive decision making based on a 'joined up' view of the performance of the organisation.

In addition, and recognising that this is just the beginning of the journey, THG now has a programme management framework in place, underpinned by an organisation and governance structure owned by the Head of TEC, that is properly equipped to manage and deliver technology enabled business change into the future and support the group's drive for continuous improvement.

Valerie Michie, CEO for The Huntercombe Group, concludes: "DAV has done an outstanding job. As a result of their expert guidance and structured approach, the new programme plan and business case, which significantly varied from our original plan and budget, was signed off by the Board and investors. In particular, the way in which DAV outlined the business case was superb and universally acclaimed – praise I have to say that is not given lightly by the senior management team at The Huntercombe Group or by Terra Firma."



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