




## Midlothian Health and Social Care

### Financial Recovery Actions 2024/25

<b>Finance Recovery Action: Planning, Performance, and Programme Funding</b>	<b>Exec Lead(s):</b>	Gill Main, Integration Manager		
<b>Description:</b> <i>A reduction in funding to the Planning Performance and Programme team will initiate Organisational Change in partnership with NHS Lothian, Midlothian Council and Trade Union partners to reduce recurring staff-pay costs by £448K.</i>	<b>Lead Service Area(s):</b>	Planning, Performance, and Programme		
	<b>Financial Recovery Value</b>	£448K		
	<b>Risk Level</b> <i>(of not delivering the financial saving)</i>	High	<b>Plan Date</b>	21/03/2024
			<b>Version</b>	v1

Strategic Aims	Actions	Dependencies	Risk Mitigation		Delivery Timeframe
<i>Which Strategic Aims are impacted by this recovery action?</i>	<i>What are the high-level actions that you are going to take?</i>	<i>What are the factors that influence this work that are out with your control?</i>	<i>What are the main risks?</i>	<i>How are you mitigating these risks?</i>	
No.1 No.2 No.3 No.4 No.5 No.6	Commence Organisational Change with NHS Lothian, Midlothian Council and Trade Union partners.  Determine the most effective use of the available resources to meet the needs of Midlothian IJB and HSCP.  Progress and then conclude Organisational Change to realise the total financial recovery value.	Collaborative working across organisations and staff groups.  Any ongoing HR processes.  NHS Lothian and Midlothian Council terms and conditions of employment.	The time between commencing and concluding organisational change will result in a limited return on the savings target in 24/25.  The full recovery value will not be realised until organisational change concludes in full.  Organisational change will be required across NHS Lothian and Midlothian Council employed staff groups and impact widely on a range of roles and job descriptions.  Key IJB and HSCP duties are likely to be incomplete or delayed.	Suspend recruitment to posts which become vacant prior to organisational change commencing.  Close working with the HSPC management team, Partnership colleagues, all staff groups impacted, Employee Relations, and HR.  Request NHS Lothian and Midlothian Council support the HSCP Management Team to create the conditions for Organisational Change to commence.  Reduce the scope and depth of support to the IJB and HSCP.  Reallocate tasks that require skills and competencies that are not unique to strategic planning, analysis, or project management professionals.	Unknown

Triangulation		Evidence and Data Sources	Tolerance		Reporting Frequency
<i>The areas of our triangulated approach to monitoring impact</i>		<i>What data/information source(s) are you using to monitor change over time?</i>	<i>What would indicate the recovery action is being successfully managed?</i>	<i>What would indicate corrective or additional support is required to deliver this recovery action?</i>	<i>How frequently will you report on progress?</i>
	Population Need	<p>Progress towards an agreed timeline and achievement of key milestones.</p> <p>iMatter reports and Staff Stress Risk Assessments.</p> <p>Organisational Change documentation.</p>	<p>Organisational Change is underway and being progressed appropriately and in a timely manner.</p> <p>Staff remain well, at work and productive throughout the Organisational Change process.</p> <p>There is strong evidence of collaborative working, shared decision making and shared responsibility for outcomes across the HSCP Management Team.</p>	<p>Organisational Change has not commenced.</p> <p>iMatter engagement index or PDr/MPM completion decreases, and/or staff absence, stress at work or attrition increase.</p> <p>Progress cannot be made in advancing Organisational Change.</p>	Quarterly
	Finance	<p>Monthly Service Finance Reports.</p>	<p>The total financial recovery value has been achieved through Organisational Change</p> <p>Agreed targets towards the total financial recovery value are met at key milestones.</p>	<p>No progress has been made towards achieving the total financial recovery value.</p> <p>Limited progress has been made towards achieving the total financial recovery value and key milestones have not been met.</p>	Quarterly
	Outcomes	<p>OutNav: IJB Strategic Commissioning Map.</p>	<p>The OutNav Heatmap will shows a maintained or improved position in both our progress and our confidence in the strength of our evidence.</p> <p>The OutNav Heatmap clearly demonstrates the contribution the service make to the 6 strategic aims continues to indicate progress and a high confidence in the strength of the evidence.</p>	<p>The IJB is not satisfied the statutory governance of the IJB is being conducted appropriately or in a timely manner.</p> <p>The IJB is not satisfied the business of the IJB is being conducted appropriately or in a timely manner.</p> <p>The IJB is not satisfied that strategic planning activity and reporting is being conducted appropriately or in a timely manner.</p>	Quarterly