

Strategy
templates

2014/15 –
2018/19



Strategy templates

Part of the set of templates that support Everyone counts: Planning for patients 2014/15 – 2018/19

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Introduction:

A strategic plan differs from an operational plan in many ways; it should be short, focussed and describe in a motivational way the direction of the organisation (s) that have signed up to it. It describes to those outside the system what the system plans to achieve in a way that informs and engages. It provides the basis for further detailed planning and should stimulate change in a system. That said, the strategic plan must also be realistic and attainable, to allow those within the system to understand and align with the strategic vision whilst working at all operational levels.

It is essential for these plans to be at the forefront of the planning process; they set the vision, ambitions and framework against which the two year detailed operational plans will be set. To help the submission of attainable and ambitious plans, templates have been developed that we hope are simplistic, flexible and helpful to commissioners and health systems generally.

What are we asking for?

Strategic planning should include the following elements:

- A long term strategic vision
- An assessment of the current state and current opportunities and challenges facing the system
- A clear set of objectives, that include the locally set outcome ambition metrics
- A series of interventions that when implemented move the health system from the current position to achieving the objectives and implementing the vision

Each strategic plan needs to be tested against the six characteristics of a sustainable health and care system (outlined below and from page 10 of *Everyone Counts*) ensuring that it reflects the needs of local citizens, the conclusions of local Call to Action conversations and informed by modelling tools such as Any town.

The structure of the submission has two core sections that we are asking to be completed and returned to us, in accordance with the timelines issued separately. These sections are a plan on a page and a key lines of enquiry submission – the strategic template will be deemed incomplete unless both sections are returned.

1. A *system wide* description of what the health economy should look like in five years. This system vision should identify how the health system will shape itself to meet future health demands without compromising quality outcomes or financial sustainability –the plan on a page is a helpful approach to describing this vision and a draft guide has been included in Appendix A.
2. A unit of planning¹ specific narrative describing how each organisation would reach this desired state through a high level road map that captures the high impact interventions planned within the health economy. This narrative takes the form of a key lines of enquiry submission. While this Strategy template looks for a narrative, this narrative must relate to, and underpin, the five year plans submitted in the related templates covering finance, activity and outcomes. To reduce duplication we have not asked for this material to be repeated in this document. In addition, the two year operational plans need to be consistent with the strategic direction set out here and triangulation across these various elements will be part of the assurance process.

This template contains the requirements of both sections of the template.

¹ The unit of planning will be determined by CCGs in accordance with letter issued on 04 November 2013

Section one | System narrative plan on a page

The plan on a page should have stakeholder sign up to its goals at a local health economy level. It should include the following characteristics:

Segment	Covering:	Supported by:
1. System vision	A statement describing what the desired state would be for the health economy in 2018/19 – this should ideally describe the health and care system rather than an individual organisation view – and which accounts for the six characteristics of a high quality, sustainable health and care system	Stakeholder sign up Individual organisation visions
2. Improving quality and outcomes	A) Looking at the seven improving outcome ambitions identified in <i>Everyone Counts</i> : planning for patients, how does the health economy plan to improve these and where appropriate, what level of improvement does it expect?	Detailed metrics will be provided in the operational template for years 3 - 5
	B) What other local quality improvement plans are in place and how do these align with the local strategic needs assessments?	Sign up from key stakeholders such as Health and Well-being Boards
3. Sustainability	In five years, what are the health economy goals for sustainability including reference to financial position, other resources and points of service delivery. This work should reference the do nothing gap calculated for the system by 2018/19 that aligns to the challenges identified in A Call to Action ²	Detailed metrics supplied in the financial templates for each component organisation
4. Improvement interventions	To achieve the desired end state what are the key improvement interventions planned at an organisational level and how will these deliver the quality and sustainability outcomes required?	Contract expectations included in the financial template
5. Governance overview	A summary of the governance processes in place to oversee the delivery of the plans, including high level description of what success looks like and who is responsible for measuring it	
6. Key values and principles	A summary of the agreed values and principles that underpin the system wide working required to deliver the vision	

As part of the assurance process, the plans on a page will be reviewed to understand alignment to detailed organisational metrics submitted through the operational and financial templates.

Examples of plans on a page are available separately

² <http://www.england.nhs.uk/2013/07/11/call-to-action/>

Section Two | Key lines of enquiry (KLOE)

The following table template asks key lines of enquiry and contains space for the organisation to add their responses.

Segment	Key Line of Enquiry	Organisation response	Supported by:
Submission details	Which organisation(s) are completing this submission?	<i>[Please provide the names of the organisation(s) who are completing this template]</i>	
	In case of enquiry, please provide a contact name and contact details	<i>[Please provide a names lead and contact details in case of enquiry]</i>	
a) System vision	What is the vision for the system in five years' time?	<i>[Please provide the overall system vision which should tie back to the plan on a page. How will the system look and feel from a patient's perspective?]</i>	<i>The plan on a page</i>
	How does the vision include the six characteristics of a high quality and sustainable system and transformational service models highlighted in the guidance? Specifically: <ol style="list-style-type: none"> 1. Ensuring that citizens will be fully included in all aspects of service design and change, and that patients will be fully empowered in their own care 2. Wider primary care, provided at scale 3. A modern model of integrated care 4. Access to the highest quality urgent and emergency care 5. A step-change in the productivity of elective care 6. Specialised services concentrated in centres of excellence (as relevant to the locality) 	<i>[Please provide details of how these models and characteristics have been embedded into the five year plans, including referencing the activity and finance projections impacted by the characteristics. The activity and financial projections should be provided in the specific operational and financial templates.]</i>	<i>Details provided within the activity and financial templates which will be triangulated.</i>

Segment	Key Line of Enquiry	Organisation response	Supported by:
	<p>How does the five year vision address the following aims:</p> <ul style="list-style-type: none"> a) Delivering a sustainable NHS for future generations? b) Improving health outcomes in alignment with the seven ambitions c) Reducing health inequalities? 	<p><i>[Please add your response to the key lines of enquiry here.</i></p> <p><i>A) From a resources perspective, what will the position be in five years' time? Is this position risk assessed?</i></p> <p><i>B) You should explain how your five year strategic plan will improve outcomes in the seven areas identified, within the context of the needs of your local population and what quantifiable level of improvement you are aiming to achieve]</i></p>	<p><i>[Please reference additional supporting documentation you feel is helpful]</i></p>
	<p>Who has signed up to the strategic vision? How have the health and wellbeing boards been involved in developing and signing off the plan?</p>	<p><i>[Please provide details of the organisations who have signed up to this vision and the process by which sign up was obtained]</i></p>	
	<p>How does your plan for the Better Care Fund align/fit with your 5 year strategic vision?</p>		
	<p>What key themes arose from the Call to Action engagement programme that have been used to shape the vision?</p>	<p><i>[Please provide details of key feedback from any call to action engagement and confirm how these have been incorporated into the strategic vision?]</i></p>	
	<p>Is there a clear 'you said, we did' framework in place to show those that engaged how their perspective and feedback has been included?</p>		
<p>a) Current position</p>	<p>Has an assessment of the current state been undertaken? Have opportunities and challenges been identified and agreed? Does this correlate to the Commissioning for Value packs and other benchmarking materials?</p>		
	<p>Do the objectives and interventions identified below take into consideration the current state?</p>		

Segment	Key Line of Enquiry	Organisation response			Supported by:
	Does the two year detailed operational plan submitted provide the necessary foundations to deliver the strategic vision described here?				
b) Improving quality and outcomes	At the Unit of Planning level, what are the five year local outcome ambitions i.e. the aggregation of individual organisations contribution to the outcome ambitions?	Ambition area	Metric	Proposed attainment in 18/19	
		1			
		2			
		3			
		4			
		5			
		6			
		7			
	How have the community and clinician views been considered when developing plans for improving outcomes and quantifiable ambitions?				
	What data, intelligence and local analysis was explored to support the development of plans for improving outcomes and quantifiable ambitions?				
	How are the plans for improving outcomes and quantifiable ambitions aligned to local JSNAs?				
	How have the Health and well-being boards been involved in setting the plans for improving outcomes?				
c) Sustainability	Are the outcome ambitions included within the sustainability calculations? I.e. the cost of implementation has been evaluated and included in the resource plans moving forwards?				

Segment	Key Line of Enquiry	Organisation response	Supported by:
	Are assumptions made by the health economy consistent with the challenges identified in a Call to Action?		
	Can the plan on a page elements be identified through examining the activity and financial projections covered in operational and financial templates?		
d) Improvement interventions	<p>Please list the material transformational interventions required to move from the current state and deliver the five year vision. For each transformational intervention, please describe the :</p> <ul style="list-style-type: none"> • Overall aims of the intervention and who is likely to be impacted by the intervention • Expected outcome in quality, activity, cost and point of delivery terms e.g. the description of the large scale impact the project will have • Investment costs (time, money, workforce) • Implementation timeline • Enablers required for example medicines optimisation • Barriers to success • Confidence levels of implementation <p>The planning teams may find it helpful to consider the reports recently published or to be published imminently including commissioning for prevention, Any town health system and the report following the NHS Futures Summit.</p>	<p>Intervention One <u>Overall description</u> [CCG to comment]</p> <p><u>Expected Outcome</u> [CCG to comment with particular emphasis on the impact on the outcome ambitions or the six characteristics]</p> <p><u>Investment costs</u></p> <ul style="list-style-type: none"> • Financial costs [CCG to comment] • Non-Financial costs [CCG to comment] <p><u>Implementation timeline</u> [CCG to comment]</p> <p><u>Enablers required</u> [CCG to comment]</p> <p><u>Barriers to success</u> [CCG to comment]</p> <p><u>Confidence levels of implementation</u> [CCG to comment]</p>	

Segment	Key Line of Enquiry	Organisation response	Supported by:
e) Governance overview	What governance processes are in place to ensure future plans are developed in collaboration with key stakeholders including the local community?		
f) Values and principles	Please outline how the values and principles are embedded in the planned implementation of the interventions		

Appendix A: One potential approach to developing a system plan on a page

