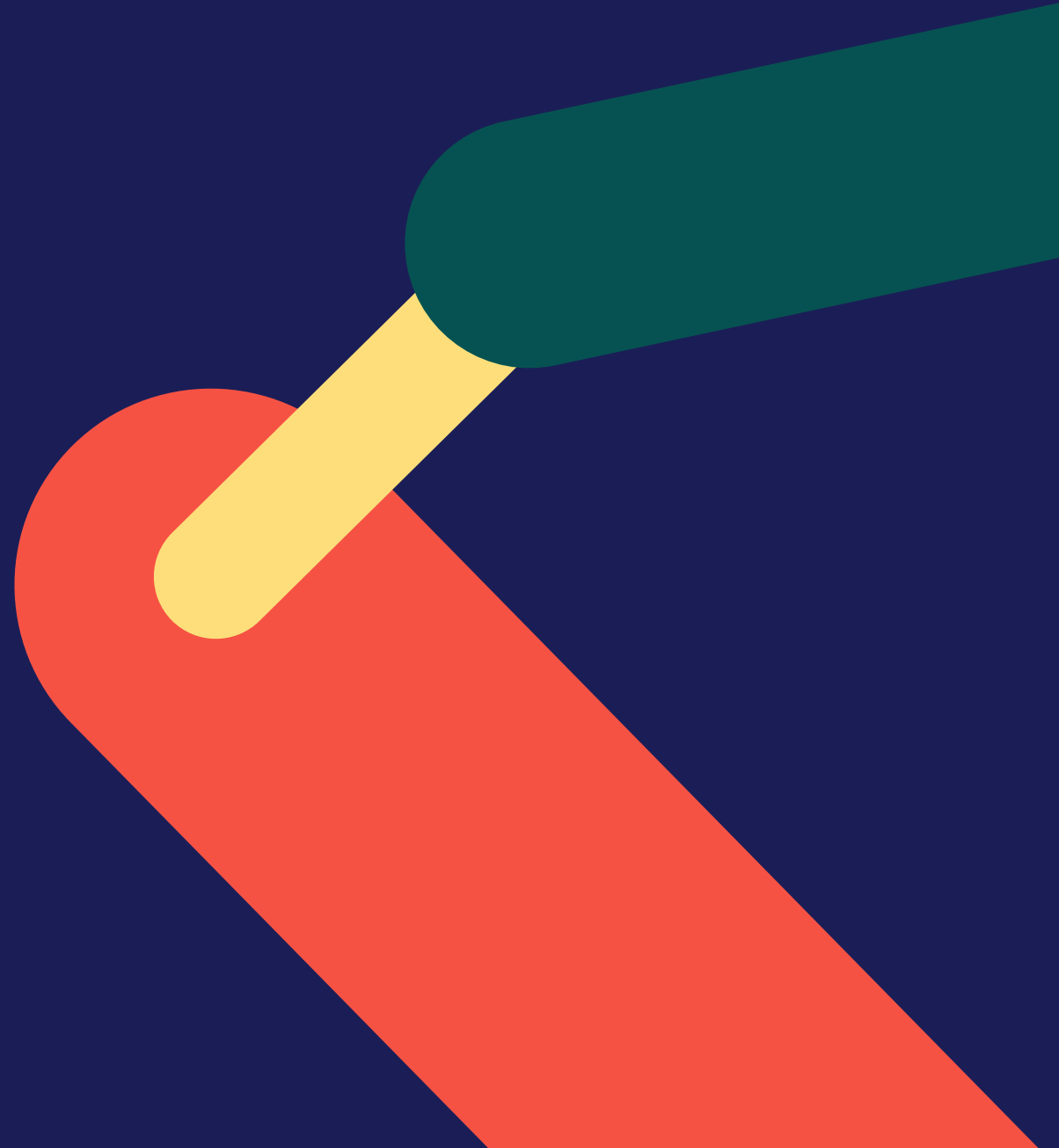


# The PSC

## Delivering Fast Effective Projects

Example Kick-Off Pack

© The PSC / Circulation Limited - Client



# First Draft Problem Definition Sheet\*

**Project Title:** Oldtown ICB Emergency Services Project

## 1. Basic question to be resolved:

How can the Oldtown ICB ensure that the 4 Emergency Services in its catchment area meet clinical catchment guidelines while ensuring financial balance by end of FY3?

## 2. Stakeholders, decision makers and project resourcing

- Decision makers
  - ICB Chief Executive Officer
  - Chief Executives of the four acute trusts
  - Trust boards
- Steering group
  - ICB Chief Finance Officer
  - ICB Medical Director
  - Mgmt representatives from trusts

## 4. Scope of the work

- **The following are out of scope:**
  - Changes to the clinical catchment guidelines
  - Seeking additional funding from NHS

## 6. Context

- ICB unable to commission all needed services, sees room for improvement
- Two trusts already in deficit, others in risk in next two years
- Catchment population served is too small to meet new ES clinical catchment guidelines
- Acute trust staff are likely to feel threatened by this work

## 3. Desired outputs and criteria for success

- Opportunities identified to restore financial balance to the ICB and four trusts
- Plan in place to ensure compliance with guidelines within 2 years
- Stakeholders own the ultimate decisions and feel confident with the proposed solution

## 5. Outline timings and milestones

- Monthly steering group meetings
- Workshop to test and improve initial findings (Dec)
- Workshop to develop options in early February (6 weeks)
- Final report for mid March (3.5 months)

## 7. Constraints and dependencies/interfaces

- Any changes must be clinically appropriate
- Any changes must be financially viable
- Patient preference / political considerations

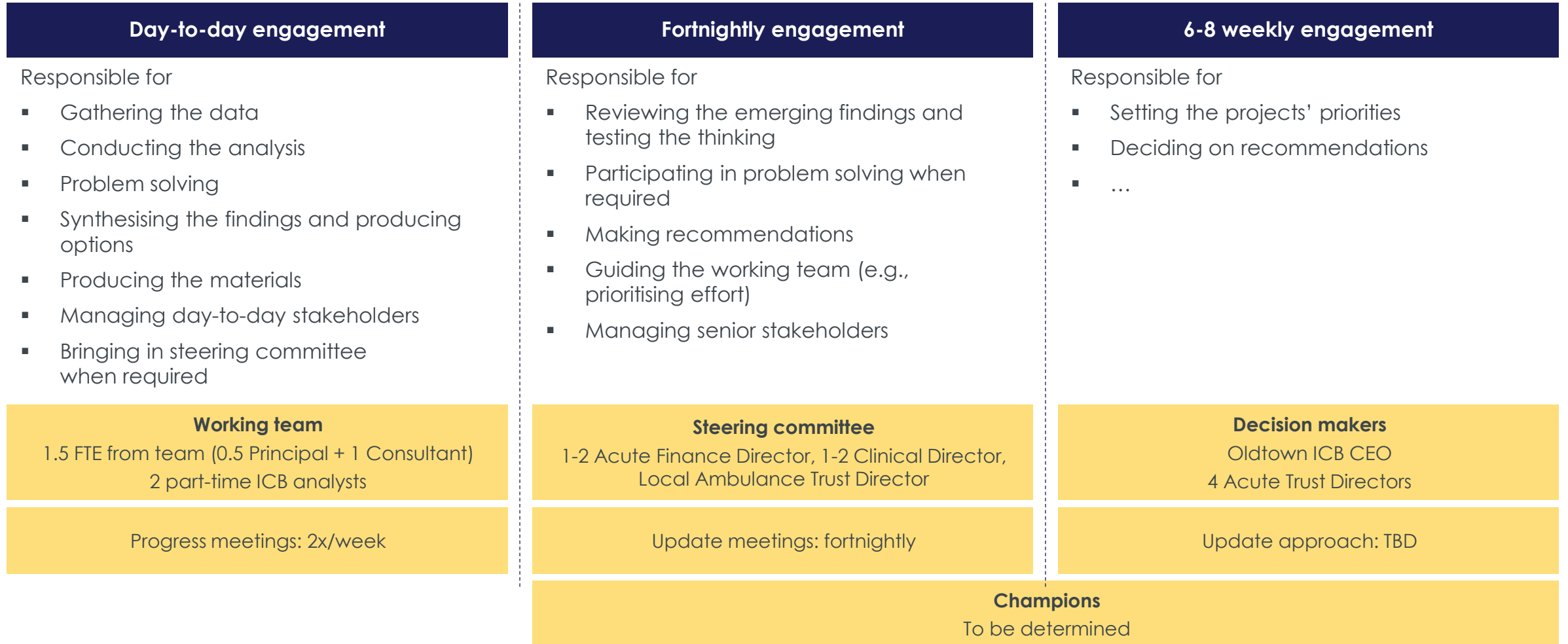
# Project workplan

	November	December	January	February
	<b>Set-Up</b>		<b>Diagnosis and Option Development</b>	
				<b>Report &amp; Syndicate findings</b>
<b>Estimated Duration</b>	<b>1-2 weeks</b>	<b>~2.5 months</b>	<b>2-3 weeks</b>	
<b>Key activities</b>	<ul style="list-style-type: none"> <li>Understand context</li> <li>Establish sponsor team working relationships</li> <li>Identify key stakeholders</li> <li>Put in data requests</li> <li>Set up interviews/ fieldwork</li> </ul>	<ul style="list-style-type: none"> <li>Conduct interviews with key stakeholder groups (see later slide for initial list)</li> <li>Gather data</li> <li>Determine analytical priorities and conduct analyses</li> <li>Syndicate and review findings</li> <li>Conduct follow-up interviews as appropriate</li> </ul>	<ul style="list-style-type: none"> <li>Share recommendations</li> <li>Work with Steering Group to:               <ul style="list-style-type: none"> <li>Influence key decision-makers</li> <li>Develop outline action plan for implementation</li> </ul> </li> </ul>	
<b>Key meetings</b>	<ul style="list-style-type: none"> <li>First Steering Group meeting</li> <li>Kick off working team meeting</li> </ul>	<ul style="list-style-type: none"> <li>Workshop to test and improve initial findings (Dec)</li> <li>Workshop to develop options (early February)</li> <li>Steering Groups (first week January, first week February)</li> </ul>	<ul style="list-style-type: none"> <li>Final Steering Group (last week December)</li> <li>Workshop to syndicate and improve options and recommendations (second week February)</li> </ul>	
<b>End products</b>	<ul style="list-style-type: none"> <li>List of interviewees/ fieldwork</li> <li>Interview guides</li> <li>Data request</li> </ul>	<ul style="list-style-type: none"> <li>Initial findings report diagnosing strategic challenges facing Oldtown ICB</li> <li>Emerging recommendations report, including:               <ul style="list-style-type: none"> <li>Interim List of reconfiguration options, with associated financial savings and quantified estimates of impact on patient experience</li> <li>SWOT analysis / risk assessment of delivering each option</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Final report</li> </ul>	

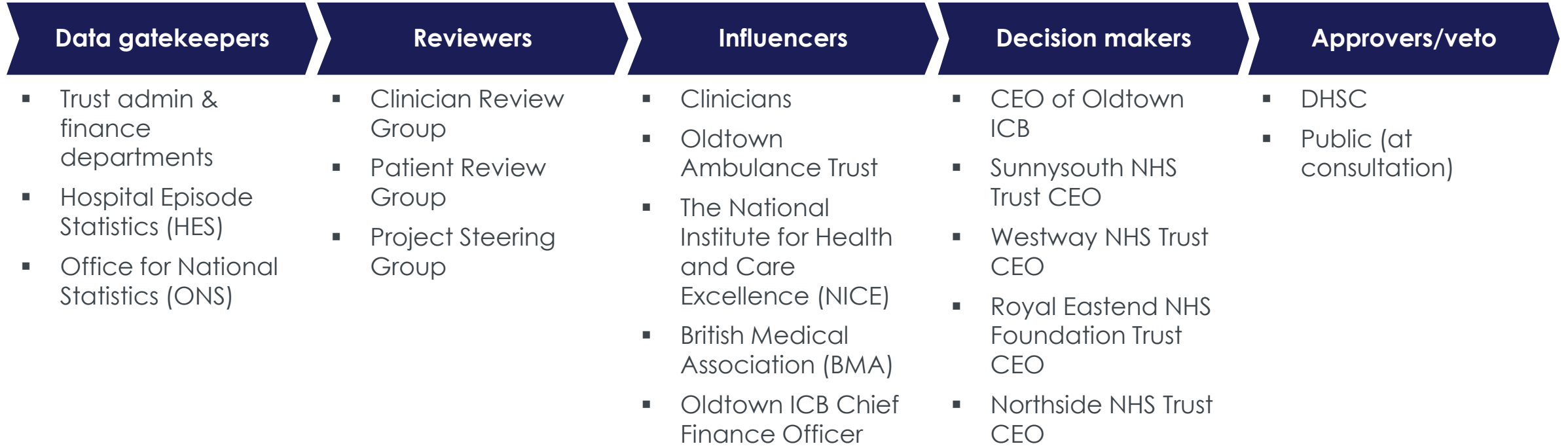
# Project deliverables/outputs

Deliverable Product	Required by . . .	Comments
Initial findings report	1 January	Presents diagnosis of strategic challenges facing ICB CEO, including any likely trade-offs
Emerging recommendations report	1 February	Identifies likely strategic options and updates on analytical progress
Final end report	28 February	Outlines strategic options for the ICB and making recommendation of preferred option(s)

# Schematic of expected governance arrangements



# Primary stakeholders



# Information requirements checklist

- Identify relevant background reports / information:
  - Create analytical audit for information requirements
- Before conducting any analysis within the team, check what already exists:
  - Check analysis sources from elsewhere:
    - Demographics – ONS
    - National Patient data – DHSC
    - Local Patient data – ICB
    - Emergency treatment pathways – Ambulance Trust
- Identify forthcoming changes to legislation or clinical guidance
- Identify interviewees to gather background context and address remaining information gaps



Is there anyone else who might have done relevant analysis?

# Key meeting dates



To be completed during  
kick-off session



# Project risks

Risk	Probability	Steps to be taken
<ul style="list-style-type: none"> <li>Stakeholders have different expectations of outcomes.</li> </ul>	Medium	<ul style="list-style-type: none"> <li>Address key issues with stakeholders at beginning of project. Keep up dialogue to facilitate buy-in.</li> </ul>
<ul style="list-style-type: none"> <li>Work stream not coordinated with other ICB activities</li> </ul>	Low	<ul style="list-style-type: none"> <li>Plan carefully, and integrate horizon-scanning updates into programme management</li> </ul>
<ul style="list-style-type: none"> <li>Outputs are not timed to enable integration with other decision-making regarding ICB strategy</li> </ul>	Medium	<ul style="list-style-type: none"> <li>Split outputs to feed back data conclusions at appropriate times (e.g., in reflection of CEO's estimated timeline for other decision-making)</li> </ul>
<ul style="list-style-type: none"> <li>Analysis is rushed and not of high quality</li> </ul>	Low	<ul style="list-style-type: none"> <li>Be realistic about output expectations (split reports) given emphasis of strategy has shifted away from cost-savings to meeting clinical catchment guidelines</li> </ul>
<ul style="list-style-type: none"> <li>Data is absent or of insufficient quality</li> </ul>	Medium	<ul style="list-style-type: none"> <li>Build relationships with key providers and if some data areas are weak or missing then expose this as a priority for further action.</li> </ul>
<ul style="list-style-type: none"> <li>Data is contradictory</li> </ul>	High	<ul style="list-style-type: none"> <li>Thoroughly analyse underlying sources and assumptions to expose differences and seek to find an objective, consensus position.</li> </ul>

# Team working

	Areas to discuss
<b>Working styles</b>	<ul style="list-style-type: none"><li>▪ Individual working preferences (e.g., MBTI)</li><li>▪ Preferred communications style (e.g., email, phone, informal meetings)</li></ul>
<b>Norms</b>	<ul style="list-style-type: none"><li>▪ Working days</li><li>▪ Working hours</li><li>▪ Contact outside of working day/hours</li><li>▪ How to manage change / variation</li></ul>
<b>Logistics</b>	<ul style="list-style-type: none"><li>▪ Location</li><li>▪ Intranet access</li><li>▪ Availability (e.g., holidays, training)</li><li>▪ Timesheets</li><li>▪ Contact details</li></ul>

# Next steps

1. Create list of candidates for interviews:
  - Team members
  - Key customers
2. Discuss best way to organise interviews and who will take the lead
3. Establish process for obtaining data/ team materials, e.g.:
  - Samples of a range of standard and ad hoc outputs
  - Comprehensive list of all standard outputs and of ad hoc outputs produced in last 1-6 months (as appropriate)
  - Access to or overview of data management tools (i.e., databases)
4. Arrange logistics for ongoing entry to and desk space at Oldtown ICB HQ
5. Assess value in creating external case studies from interviewing other statistical units of central government departments and, if valuable, who would be the most appropriate person to conduct these interviews