



# Estates & facilities forum

07 November 2019  
110 Rochester Row, London

Kindly sponsored by: 

This conference is designed to enable finance leaders and senior facilities staff to explore how capital can be financed and consider strategic estates planning at a system level. It will also examine practical issues such as how to manage the risks of backlog maintenance, as well as examining the challenges of demonstrating value for money and ensuring estates are managed to maximise benefits to patients.

## Programme

**09:00** Registration, networking & exhibition

**10:00** **Chair's Welcome**  
*Nicky Lloyd, Chief Finance Officer, Royal Berkshire NHS FT*

**10:05** **Looking to the future of NHS Estates**  
*Simon Corben, Director and head of profession: NHS Estates & Facilities, NHS England & Improvement*

Joining delegates today, Simon will outline the importance of the NHS Estate and the staff who oversee it. He will then explore the NHS Estates strategy for the year ahead, outlining the objectives and the role of the NHS Estates teams in delivering key initiatives such as; the NHS long term plan, GIRFT alongside engaging with the model hospital.

**10:40** **Estates: snapshot sessions**

**1.** **The NHS estates and facilities sustainability strategy**  
*Fiona Daly, Sustainability and EFM Workforce Lead, NHS England & Improvement*

Fiona will be talking about how the NHS is transforming its estate to meet the Government's net zero carbon target and the opportunity for savings, and investment, across the estate to reduce emissions and meet the Government's goals.

## 2. **Commercial supplier resilience and contract management**

*Jo Dolby, Capital/ Commercial Lead, NHS England & Improvement*

Jo will join delegates today to explore resilience by providing an overview of market issues and how trusts might seek to plan and protect themselves. Alongside this, she will further take delegates on a journey from the cradle to grave of contract management by sharing her top tips for management, approach and check and review processes.

## 3. **Reducing the data burden and the digital estate**

*Adrian Eggleton, EFM Operational Lead, NHS England & Improvement*

Adrian will present on the opportunities that could arise from the Digitalisation of the NHS Estate in respect of utilisation, estate rationalisation, activity & use driven maintenance and in the long term the potential to reduce the data burden through advances in technology and analytics.

**11:40 Refreshments & exhibition**

**12:10 Workshops**

**13:10 Lunch & exhibition**

**14:00 Workshops**

**15:00 Refreshments & exhibition**

### **15:30 How to access capital as a system**

*Michelle Robinson, Strategic Finance Lead, One Acute Network Dorset and Lucy Bell, Finance Manager, NHS England & Improvement (South West)*

Dorset were awarded £147.3 million as part of STP wave 1 funding in 2017. This investment is planned to deliver the Dorset STP clinical services review in order to reconfigure acute services on the Poole Hospital NHS FT and The Royal Bournemouth and Christchurch Hospitals NHS FT sites to provide a Major Planned Hospital and a Major Emergency Hospital.

Last year Michelle shared the Dorset journey and experience of the process in accessing the capital funding. In this session, Michelle will return to the forum to share:

- An update on where Dorset are in terms of accessing the STP wave 1 funding
- Dorset's experience of accessing the capital and sharing the lessons learnt
- An update on where Dorset is in terms of spending the capital funding

**16:10 Chair's summary and close**

## **Workshop choices – please see overleaf**

## Workshop session 1 (12:10 – 13:10)

### (1A) **Maximising capital for NHS developments**

*Matthew Hunter, Partner, Capsticks, Sunita Raja, Associate, Capsticks & Howard Williams, Partner – Development and valuation consultancy, Montagu Evans*

The presentation will draw upon Capsticks and Montagu Evans recent experience on supporting clients in securing capital from alternative sources other than central funding. The presentations will cover how this can be achieved and the key benefits. We will focus on three key areas: the planning system, income strip structures and joint ventures. Further details below.

#### **Planning System**

- Understanding potential sources of capital funding from the planning system through planning contributions and community infrastructure levy (CIL).
- The link to housing targets.
- How planning contributions and CIL can be secured and spent.
- Best practice recommendations on ensuring these funds are made available for NHS investment.

#### **Income Strip Structures**

- Income strips - an alternative funding solution?
- How to structure an income strip sale and leaseback.
- Potential pitfalls and issues to consider

#### **Joint Ventures**

- Are joint ventures right for me?
- Corporate or contractual joint ventures.
- Risk, reward and management

### (1B) **Making the invisible visible at an advanced digital hospital – case study from the UK's first paperless hospital**

*Fiona Morcom, Chase Farm Hospital, James Webb, Ascom and Natalie Firminger, Strategic Estates Lead, NHS England & Improvement*

Fiona Morcom and colleagues will outline the journey on implementing a digital nurse call system (Ascom) that is helping nurses and clinicians deliver outstanding care and operational efficiencies.

### (1C) **A new long term affordable and dependable funding source via an NHS and Local Authority partnership to transform local health and social care estates**

*Urvashi Bhagat, Non-Executive Director, Integrated Healthcare Properties, Conor Burke, Director, CPB Consulting & Andrew Bulloch, Managing Director, Integrated Healthcare Properties alongside a speaker from NHS Newham Local Authority*

In this session delegates will hear about a new local funding source and explore how it can crystallise the partnerships and delivery of the locality-STP Integrated Care Strategy and the reduced impact it has on C-Del and Capital Account requirements.

This model, created by Integrated Healthcare Properties, to assist NHS bodies and Local Authorities to help establish a 100% publicly owned property joint venture which benefits from lower funding and rental costs than alternatives.

This session will further explore a case study from the first Alternative Finance Organisation (AFO) in Newham which was shortlisted for the 2019 HSJ *local partnership of the year* award. This AFO will benefit 400,000 residents and create affordable keyworker units. It fundamentally changes the historic approach to estate and service planning by being able to deliver a total locality population and estate solution in a dependable manner into the foreseeable future, away from the historic single building and provider solution in today's capital limited NHS.

## Workshop session 2 (14:00 – 15:00)

### (2A) **Master planning & maximising disposal value**

*Natasha Kerrigan* Director of Strategic Estates Planning & *Ian Burden*, Head of Disposals & Surplus Land, NHS England & Improvement

The need to reduce revenue costs and create capital puts the spotlight on to surplus and under-utilised property assets. Whilst a quick sale can help fill a financial hole this year, how do you ensure that you are truly optimising the opportunity to create value and support wider trust strategy?

The session initially sets out the importance of Master Planning in the context of your estate, but also the wider STP/ICS strategy and other government partners, bringing in funding and partnership working. Once you have identified areas for future disposal, you will want to have the knowledge of how to ensure you create the very best outcome through maximising disposal value in a way that supports the finance strategy, as well as areas such as key worker accommodation. This session provides you, the finance professional, with the key questions that you should be asking your estates teams and trust board members.

### (2B) **Community Health Partnerships**

*Gillian Hunt*, Director of Finance and *Debbie Cragg*, Head of Corporate Programme Management, Community Health Partnerships

CHP is responsible for properties which form 5% of the total NHS portfolio. Since being established in 2001, 342 integrated health, community and wellbeing centres have been delivered by the Local Improvement Finance Trust (LIFT) programme. CHP is also head tenant for 307 of these buildings.

Our buildings are flexible and we have completed a number of variations to better equip them to meet the needs of local health care systems. As part of our commitment to supporting our tenants, we are also continually looking to ensure that the space is used as efficiently as possible and have been working with a number of CCGs and Trusts to improve utilisation, efficiency and cost effectiveness.

Join our session to learn about our successful Property Utilisation Programme and how we have used technology to discover the true usage of every part of our buildings, supporting proactive planning to make better use of space for the benefit of services and, most importantly patients.

(2C)

**Forging ahead with estates renewal in an uncertain world**

***Vikki Town**, Group Finance & Operations Director & **Phil Holland**, Chief Investment Officer, Prime PLC alongside **Peter Baker**, Programme Director – Commercial Development, University Hospital Southampton NHS foundation trust*

Despite political uncertainty and lack of capital, pioneering Trust boards and CCGs have found ways to secure estates transformation and deliver new developments. This session lifts the lid on real projects to show just how NHS colleagues have worked within local health systems to secure and blend capital sources, commercial expertise and efficient delivery routes to transform environments and improve staff and patient experience.

Whether you are ready to push ahead with a development and want to ensure you have the best solution, or you are hoping for central DHSC capital to get started, this session is essential for dynamic Finance and Estates professionals looking to secure new infrastructure – today.