

# Policy and Sustainability Committee

10:00am, Tuesday, 30th August 2022

## Edinburgh Integration Joint Board Savings and Recovery Programme 2021/22 Closure Report

Executive/routine  
Wards  
Council Commitments

### 1. Recommendations

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It is recommended that the Policy and Sustainability Committee

1.1 Note the end of year position of the 2021/22 Savings and Recovery Programme

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# Report

## Edinburgh Integration Joint Board Savings and Recovery Programme 2021/22 Closure Report

### 2. Executive Summary

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- 2.1 The purpose of this report is to provide the Policy and Sustainability Committee with an update on the end of year position for the Edinburgh Integration Joint Board's (EIJB) 2021/22 Savings and Recovery Programme, focusing on the City of Edinburgh Council's (CEC) elements of the programme.

### 3. Background

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- 3.1 In March 2021 the EIJB agreed a phased Savings and Recovery Programme to deliver in year savings of £19.2m<sup>1</sup>. It was recognised that this would be challenging as Covid continued to impact operational service delivery across all sectors of health and social care.
- 3.2 A list of each of the approved projects within the EIJB's 2021/22 Savings and Recovery Programme can be found, with details of the financial impact of each of the projects found in appendix 1.
- 3.3 It should be noted that, despite agreeing this challenging savings and recovery programme, it was not sufficient to balance the IJB's budget for 2021/22 and a gap of £9.3m remained at the start of the financial year. This position was agreed with partners and recognised that there was likely to be sufficient flexibility to deliver balance by the end of the financial year.

### 4. Main report

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#### Savings and Recovery Programme Governance and Monitoring

- 4.1 Delivery of the EIJB's Savings and Recovery Programme is overseen by the Savings Governance Board (SGB), chaired by the Chief Officer. This group meets monthly with all project leads submitting progress reports which inform the overall

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<sup>1</sup> EIJB 2021/22 Saving and recovery Programme agreed at EIJB meeting on the 24<sup>th</sup> March 2021, <https://democracy.edinburgh.gov.uk/ieListDocuments.aspx?CId=160&MId=5569&Ver=4>

dashboard prepared by the Programme Manager. As part of this process all reports are signed off by finance colleagues to ensure accurate and appropriate reporting.

- 4.2 It is important to note that not all savings schemes are delivered uniquely by one organisation and that the EIJB's budget is considered as one "pot" of money, with the distinction between City of Edinburgh Council and NHS Lothian savings increasingly becoming blurred. A total of nine (9) projects in the 21/22 SRP fell under City of Edinburgh Council sole accountability.
- 4.3 NHS Lothian led Savings Projects are governed through the SGB detailed above, and existing NHS Lothian mechanisms, principally their Finance and Resources Committee.

### **Delivery of the 2021/22 Savings and Recovery Programme**

- 4.4 Whilst the COVID-19 pandemic has clearly impacted on the ability to deliver and realise associated or recurring savings for some projects within the 2021/22 Savings and Recovery Programme (SRP), it can be confirmed that financial balance has been reached across the 2021/22 programme. This includes recovering the deficit described at paragraph 3.3 above.
- 4.5 High level details of the individual projects statuses can be found in appendix 2.1, based on the Savings Governance Board (SGB) Programme Dashboard for June 2022 (covering actions up to and including March 2022). This indicates the end of year position for all savings projects. It includes: RAG statuses of progress against plan and savings; mitigations where risks or issues have been identified and highlights projects that will have financial implications for the 2022/23 SRP.
- 4.6 Projects approved as part of the 2021/22 SRP having a financial impact on the 2022/23 SRP and Financial Plan, were included in the Budget papers approved by the EIJB at their meeting on the 22<sup>nd</sup> March 2022<sup>2</sup>.
- 4.7 Where the pressures created by COVID-19 on capacity across the system led to slippages in the delivery of savings, financial balance has been achieved through under spends or slippage in other budget areas and through Scottish Government (SG) funding.

## **5. Financial impact**

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- 5.1 Outlined elsewhere in this report.

## **6. Stakeholder/Community Impact**

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### **Legal/risk implications**

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<sup>2</sup> EIJB 2021/22 Savings and Recovery Programme agreed at EIJB meeting on the 22<sup>nd</sup> March 2022: [Agenda for Edinburgh Integration Joint Board on Tuesday, 22nd March, 2022, 10.00 am - Modern Council](#)

- 6.1 The key risk to the EIJB was the ability to fully deliver the savings programme to ensure financial balance within 2020/21. As described in this report, this was achieved in year and any relevant financial impact incorporated in the 2021/22 financial plan.

### **Equality and integrated impact assessment**

- 6.2 Integrated impact assessments were undertaken for both the individual savings proposals and the programme as a whole. As appropriate these are updated as projects progress.

### **Environment and sustainability impact**

- 6.3 There is no direct additional impact of the report's contents.

### **Quality of care**

- 6.4 As above, integrated impact assessments have been undertaken for both the individual savings proposals and the programme as a whole. As appropriate these are updated as projects progress.

## **7. Background reading/external references**

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- 7.1 EIJB 2021/22 Savings and Recovery Programme agreed at EIJB meeting on the 24<sup>th</sup> March 2021, [7.1 - Savings and Recovery Programme 2021-22.pdf \(edinburgh.gov.uk\)](#)
- 7.2 EIJB 2021/22 Savings and Recovery Programme agreed at EIJB meeting on the 22<sup>nd</sup> March 2022: [6.1 Savings and Recovery Programme 22-23.pdf \(edinburgh.gov.uk\)](#)

## **8. Appendices**

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- Appendix 1 EIJB 2021/22 Savings and Recovery Programme (SRP) Projects Summary
- Appendix 2.1 EIJB 2021/22 Savings and Recovery Programme (SRP) Year End Summary
- Appendix 2.2 SRP Progress RAG Scoring Guidance
- Appendix 2.3 SRP Savings RAG Scoring Guidance

## Appendix 1: EIJB Savings and Recovery Programme (SRP) 2021/22 Summary

Project Name	SRO	Approved Target Saving <sup>3</sup>
Hosted Service & Set aside	Moira Pringle	£2.1m
Purchasing	Nikki Conway	£7.2m
Community Equipment	Sheena Muir	£250k
Sexual Health Service Review	Sheena Muir	£110k
Review Rehabilitation Services	Sheena Muir	£140k
Ex Housing Support - Older People	Katie McWilliam	£500k
Day Centres & Be Able	Katie McWilliam	£130k
Learning Disabilities	Mark Grierson	£200k
The Works	Nikki Conway	£0.3k
Substance Misuse	Colin Beck	£150k
Prescribing 21-22	Mike Massaro-Mallinson	£2.2m
OP Day Opportunity	Katie McWilliam	£163k
Positive Steps	Angela Lindsay	£0.3k
Medical Day Hospitals	Katie McWilliam	£200k
Bed Based Review	Tony Duncan	£1.6m
Policy Development	Tom Cowan	£4.0m
BBV Service Review	Colin Beck	£0.45k
LD Overnight Services	Mark Grierson	£75k
		£19.2m

<sup>3</sup> EIJB 2021/22 Saving and recovery Programme agreed at EIJB meeting on the 24<sup>th</sup> March 2021, <https://democracy.edinburgh.gov.uk/ieListDocuments.aspx?CId=160&Mid=5569&Ver=4>

## Appendix 2.1: 2021/22 Savings and Recovery Programme (SRP) Year End Summary for CEC Projects

Project Number	Project Name	End of Programme Status	End of Programme Progress RAG*	End of Programme Savings RAG**	Progress update at end of Programme / Commentary
1	Ex Housing Support - Older People	Closed	10	10	Full savings have been realised. Project activity has completed as planned. The project has been closed under CLR-07.
2	Day Centres & BeAble	Closed	10	10	Full savings have been realised. Project activity has completed as planned. The project has been closed under CLR-05.
3	Learning Disabilities	Closed	10	10	Full savings have been realised. Project activity has completed as planned. The project has been closed under CLR-01.
8	Positive Steps	Closed	10	10	Full savings have been realised. Project activity has completed as planned. The project has been closed under CLR-02.
12	OP Day Opportunity	Closed	10	10	Full savings have been realised. Project activity has completed as planned. The project has been closed under CLR-08.
16	LD Overnight Services	Closed	10	10	Full savings have been realised. Project activity has completed as planned. The project has been closed under CLR-09.
17	Policy Development	Closed	4	1	<p>The project has been closed under CLR-12. Following significant work in this area it became clear that policy review and development should not sit in isolation, rather to be effective, the process of policy and procedure review must be embedded into projects and programmes to ensure it is meaningful and impactful. For example, through the ongoing work being undertaken within SDS which will incorporate the review of any appropriate policies or procedures.</p> <p>The planned savings for 2021/22 was £4m; however, only partial savings of £400k have been achieved through this project. Savings that have been realised, have come from reviewing processes associated with Direct Payment reclaims as a result of this project. Despite the only partial realisation of savings, financial balance has been reached across the programme in 2021/22 via mitigation through the SG funding plan and identified slippage across the system. As with purchasing this saving target was reviewed as part of the 22/23 budget setting process.</p>
14	Bed Based Review (jointly attributed to CEC and NHS Lothian)	Recurrent project 22/23	5	5	Slippage in the project has meant that full savings were not realised. This was mitigated through in year savings as result of low occupancy rates in residential care. Activities to realise further savings have been rolled over into the 2022/23 savings programme

Project Number	Project Name	End of Programme Status	End of Programme Progress RAG*	End of Programme Savings RAG**	Progress update at end of Programme / Commentary
7	Purchasing	Recurrent project 22/23	5	1	<p>Work has been ongoing to implement changes across the purchasing project that support grip and control and improve practice, despite increased demand and reduced capacity due to the impact of COVID-19. The impact of the work completed and therefore the delivery of savings has been restricted by challenges linked to staff capacity and the cost and availability of affordable care and support. A break-even position has been reached across the programme in 2021/22 via mitigations through the SG funding plan and identified slippage across the system. A revised project brief has been approved as part of the 2022/23 savings programme.</p>

## Appendix 2.2 SRP Progress RAG Scoring Guidance

<b>Red</b>	<b>0</b>	No confidence in delivery
<b>Red</b>	<b>1</b>	Critical issues threaten the success of the project and confidence in delivery is very low
<b>Red</b>	<b>2</b>	Significant project issues mean project is not on track and confidence in delivery is very low
<b>Amber</b>	<b>3</b>	Major problems regarding project performance and no or limited corrective actions in place
<b>Amber</b>	<b>4</b>	Major problems regarding project performance and delivery, but corrective actions are in place to improve confidence in delivery
<b>Amber</b>	<b>5</b>	Problems exist regarding project performance, delivery of corrective actions are/ have been delivered, with reasonable confidence of success
<b>Amber</b>	<b>6</b>	Minor problems exist with the project but confidence in the delivery of the project remains high
<b>Green</b>	<b>7</b>	Project on track and expected to deliver minimum outputs/ benefits
<b>Green</b>	<b>8</b>	Project on track. Progress and achievement of the project is on target
<b>Green</b>	<b>9</b>	Progress and achievement of the project is likely to exceed planned output/benefits
<b>Blue</b>	<b>10</b>	Project completed and outputs/ benefits delivered. Appropriate learning shared within and beyond Programme



**Appendix 2.3 SRP Savings RAG Scoring Guidance**

<b>RAG Rating</b>		<b>% of Savings Target</b>
Red	0	0% achieved
Red	1	<20%
Red	2	20% - 30%
Amber	3	30% - 40%
Amber	4	40% - 50%
Amber	5	50% - 60%
Amber	6	60% - 70%
Green	7	70% - 80%
Green	8	90% -100%
Green	9	>100% achieved
Blue	10	Financial balance achieved and recorded in General Ledger Appropriate learning shared within and beyond Programme