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Paper 11 - PHR Benefits Management Approach v0.2  
Public Health Reform Programme Board - 25th February 2019

# COSLA/ Scottish Government – Public Health Reform

## Benefits Management Approach



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**Owner:** Public Health Reform, Senior Responsible Owners

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## 1. Purpose

The purpose of this document is to define the strategic approach to Benefits Management within the Public Health Reform (PHR) Programme. This strategy will outline the approach to Benefits Management and Benefits Realisation, the governance expectations, how benefits will be prioritised and measured, and the roles and responsibilities of those involved in realising the benefits.

This document will seek to define:

- The process for identifying, quantifying (identifying the impact), documenting, planning and tracking benefits
- The categories to be used for benefits
- The governance arrangements covering benefits management

This document will allow the PHR Programme Board to ensure that:

- A Benefits Management Strategy is established which can be consistently applied across the PHR Programme.
- Reliable, up-to-date information regarding benefits is available to those managing the various aspects and components of the PHR Programme.
- Full consideration is taken of the impact on the benefits required to be realised by the project, before key decisions are taken by the PHR Programme Board.
- The benefits of the PHR Programme are accessible and understood by all stakeholders.
- There is clarity around roles and responsibilities in the benefits realisation process for the PHR programme Board.
- There are processes in place to review and update expected benefits at key stages.
- The organisation has the necessary capabilities and capacity to deliver the benefits management strategy.
- There is a framework in place to assure Scottish Government and COSLA leaders of the ability to deliver the benefits expected of the PHR Programme.

This document should be reviewed periodically to ensure it is fit for purpose for the PHR Programme.

## 2. Executive Overview of the Public Health Reform Programme

Public health reform is a partnership between Scottish Government and the Convention of Scottish Local Authorities (COSLA).

Public health reform aims to challenge current ways of working, put more decisions directly in the hands of citizens and provide support to local communities to develop their own approaches and solutions to local population health challenges.

To deliver the vision for public health reform, Scottish Government and COSLA will:

- agree public health priorities for Scotland that are important public health concerns and that we can do something about
- establish a new national public health body for Scotland bringing together expertise from NHS Health Scotland, Health Protection Scotland and Information Services Division
- support different ways of working to develop a whole system approach to improve health and reduce health inequalities.

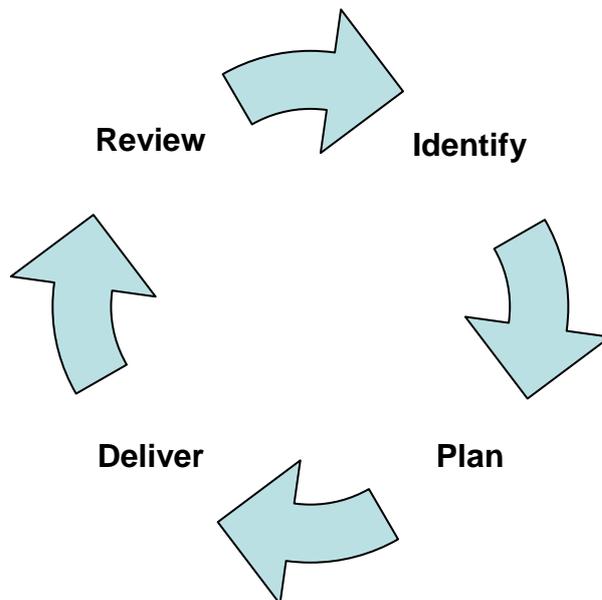
Further details regarding the Public Health Reform Programme, its objectives, deliverables and timescales can be found in the Programme Brief embedded below.



### 3. Benefits Management Cycle

The benefits management approach being applied to the Public Health Reform programme reflects best practice methodology and is aligned to the Managing Successful Programmes (MSP) approach to Programme Management.

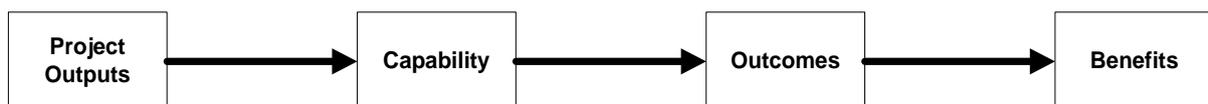
The benefits management cycle is continuous and iterative throughout the lifecycle of the programme.



MSP describes a benefit as ***the measurable improvement resulting from an outcome perceived as an advantage by one or more stakeholders, which contributes towards one or more organisational objective(s).***

For the purpose of this document the following definitions are being used:

- **Outputs** – The deliverable, or output developed by a project.
- **Capability** – The completed set of project outputs required to deliver an outcome.
- **Outcome** – A new operational state achieved after transition of the capability into business as usual.
- **Benefit** – The measurable improvement resulting from an outcome.



The diagram above show the relationship between outputs, capabilities, outcomes and benefits.

### 4. Identification and mapping of Benefits

An initial benefits identification workshop was held in Summer 2018 where key stakeholders were invited to share their ideas on the benefits that could be realised with the establishment of Public Health Scotland. The following high level outcomes were identified:

- Improved collaboration across the whole system
- Reduced gaps in Public Health knowledge
- Increased resource capacity across whole system
- Reduced duplications across PH workforce
- Increased Public Health data and intelligence for application at National, Regional and local levels

Further work to identify benefits will be completed mid-February 2019. All benefits identified will be worked up to identify measurements, timeline for realisation, owners and prioritised as outlined in section 7.

A benefits map will also be produced that will demonstrate the relationship between a strategic objective, outcome, output and benefit.

All those involved with the Public Health Reform Programme have a responsibility to identify any potential Benefits and dis-benefits.

Benefits will be identified using an unrestricted, open-minded approach to ensure all possible benefits have been identified. Benefits will be identified by consulting with relevant and representative stakeholders and understanding what improvements they see as a result of positive outcomes.

## 5. Categorisation of Benefits

For the benefits identified for the Public Health Reform Programme the following categories will be used:

- Safer
- Effective
- Person-centred

These categories have been taken from the Scottish Government Health and Social Care Quality Strategy.

## 6. Prioritising benefits

Mapping benefits will determine the types of benefit to be realised and the category in which each benefit should fall. By applying a benefit type, it will allow each benefit to be prioritised.

- **Cash releasing benefits (CRB):** these benefits reduce the costs of organisations in such a way that the resources can be re-allocated elsewhere. This typically means that an entire resource is no longer needed for the task which it was previously used. This can be staff or materials.
- **Financial but non-cash releasing benefits (non-CRB):** this usually involves reducing the time that a particular resource takes to do a particular task, but not sufficiently to re-allocate that resource to a totally different area of work.
- **Quantifiable benefits (QB):** these benefits can be quantified, but not easily in financial terms – for example, ‘reduced travelling time for customers’. The extent to which QBs are measured will depend on their significance.
- **Non-quantifiable (non-QB):** these are the qualitative benefits, which are of value but cannot be quantified.

## 7. Benefit Profiles

For each benefit identified, a benefits profile will be produced. The profile will detail:

- Description – What the benefit is.
- Outcomes – What the verifiable difference delivered will be.
- Attribution – Where the benefit will arise
- Measurement – How and the benefit will be measured
- Owner – Who is responsible for the delivery of the benefit.

This will support the development of the overall programme benefits realisation plan. A full benefit profile template can be found in [Appendix A](#).

## 8. Benefit Realisation Plan

Some benefits will take longer to realise than others, and will be planned to ensure that they are realised at the expected moment. This includes any benefits due to be realised after Public Health Scotland has been vested.

In order to achieve the benefits, the appropriate capabilities and outcomes will need to be delivered. This will all be captured in the Benefits Realisation plan which will be developed in the Summer of 2019.

The Benefits realisation plan will include:

- The benefit
- Milestone(s)
- Estimated effort/ cost
- Dependencies

An example of the Benefits Realisation Plan can be found in [Appendix B](#).

## 9. Delivering the benefits

Benefits will be managed using a standard benefits management approach and monitored and reported on via the appropriate governance bodies. (See section 10)

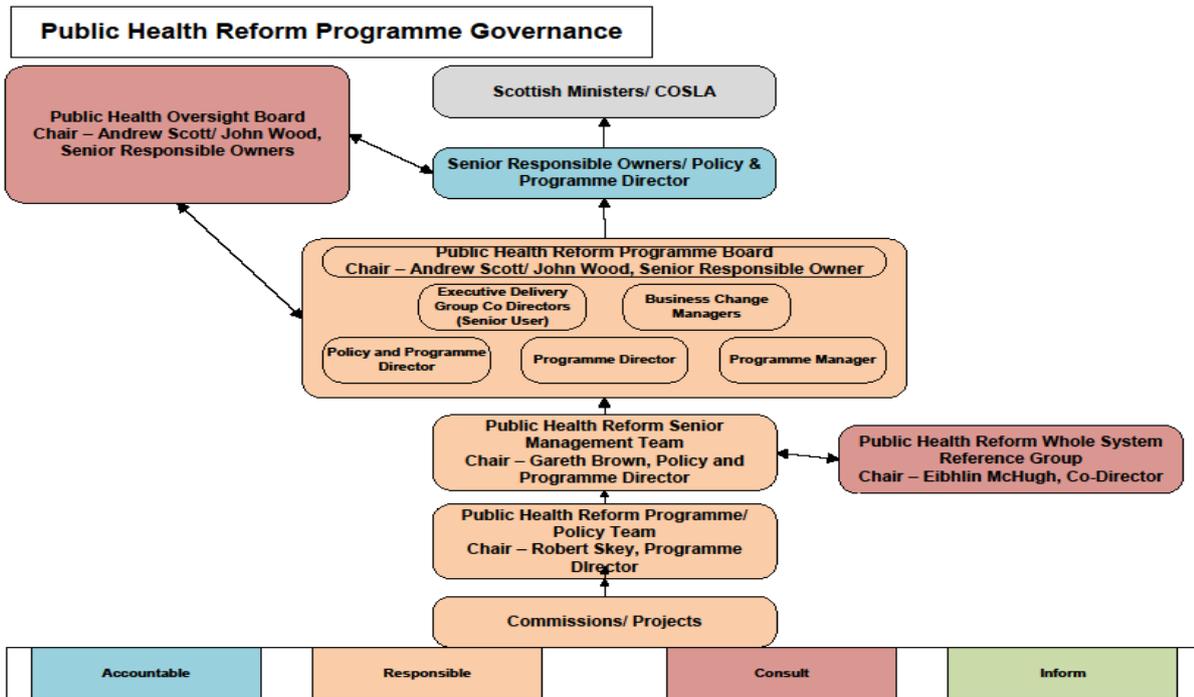
The programme Benefits Realisation Plan, once created, will be regularly reviewed and updated by the Programme Team and SRO.

## 10. Reviewing the benefits

Monitoring and reviewing progress of a benefit will be undertaken throughout the lifetime of the PHR programme by the PHR Programme Manager and Business Change Managers and reporting on progress to the PHR Programme Board.

## 11. Governance

The Public Health Reform Programme will run until March 2020 and will oversee the monitoring and delivery of the benefits. The governance for the Programme is outline in the diagram below:



The PHR Programme board will review the benefits on a quarterly basis until the end of the programme (March 2020)

An update on benefits will be provided via a progress report and make use of the standard red/ amber/ green status to indicate if the benefit is on track, under threat or unable to be realised.

Following the closure of the Public Health Reform Programme, any benefits which have not yet been realised, will be handed over to Public Health Scotland to deliver.

## 12. Key roles and responsibilities

The PHR Programme Board are responsible for the delivery of any benefits within the programme’s lifespan.

The responsibilities by role in relation to the programme’s benefits are contained in the table below.

Role	Responsibility
Senior Responsible Owner (SRO)	<ul style="list-style-type: none"> <li>• Reports to the sponsoring group, in this case Scottish Ministers, on the delivery of the programme benefits</li> <li>• Ensures that the programme and the business areas affected maintain a focus on benefits delivery</li> </ul>
Programme Manager	<ul style="list-style-type: none"> <li>• Develops the benefits management strategy with the Business Change Managers and relevant stakeholders</li> <li>• Develops the benefits realisation plan in consultation with the Business Change Managers, relevant stakeholders and members of the project teams</li> <li>• Monitors the delivery of identified benefits</li> <li>• Reviews the success of benefits delivered</li> <li>• Reports on benefits to the Programme Board</li> </ul>
Business Change Manager(s) (BCM)	<ul style="list-style-type: none"> <li>• Identifies and quantifies the benefits with the support of relevant stakeholders, the programme manager and members of the project teams</li> <li>• Delivers particular benefits as profiled</li> <li>• Provide information to support the creation and delivery of the</li> </ul>

	benefits realisation plan <ul style="list-style-type: none"><li>• Develops and maintains the benefits profiles</li></ul>
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### **13. Handover of Benefits Realisation**

Following the closure of the Public Health Reform Programme, any benefits remaining will be passed over to the identified team to monitor delivery.

## 14. Document Control Sheet

### Key Information:

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## Appendix A – Example Benefits Profile

BENEFIT PROFILE FOR <i>XXX Programme</i>			
Benefit ID.		Benefit Owner	
Profile Agreement Date		Last Reviewed	
Benefit Type			
Benefit Description			
Scale of Impact			
Timescale/ Profile			
Benefits Valuation			
Measurement	Baseline		
	Ongoing		
Measurement frequency			
Measurement source			
Stakeholders			
Dependencies			
Assumptions			
Risks			
Costs			
Review Timescale			
Benefits History			



