



Scoping

CARDIAC STRATEGIC REVIEW

CEO Sponsor

Philip Kloer

SRO

Melanie Wilkey

Delivery Lead

Susan Kedward

Summary

Expected Start Date

Rollover Foundation Plan

Expected End Date

Q4

Aim

What is the overall intention or purpose of this activity?
Write a short statement describing what you want to achieve.

Ensure commissioning of efficient, effective and high-quality services within the context of the wider system and pathways and identify opportunities to mitigate the financial risk to NWJCC Cardiac Surgery and TAVI commissioning to ensure that all patients in South Wales have timely and equitable access to a safe and sustainable service.

Background / Context

Summarise why this work is needed, what prompted it, and any relevant context (e.g., policy drivers, service gaps).

Cardiac Review was initiated in January 2023 following approval by the Joint Committee of a paper which identified that NWJCC-commissioned cardiac surgery and TAVI services had been subject to developments that had impacted the form and scale of current provision.

A two-phase approach was agreed, with the aims of each phase comprising:

Phase 1

1. Re-baselining of cardiac surgery and TAVI contracts to ensure that they better reflect potential demand, including review of the performance of those NHSE centres from which NWJCC commissions cardiac surgery and TAVI
2. A TAVI Commissioning Policy review to assess the extent to which, in view of recent trends and differential valve costs, the policy remains both adhered to and apposite, including an analysis to identify the relationship between patient need, valve type and outcomes.



Scoping

Background / Context

Summarise why this work is needed, what prompted it, and any relevant context (e.g., policy drivers, service gaps).

Phase 2

1. Demand and Capacity Planning, informed by a population needs assessment and concluding with an options appraisal that establishes the preferred future commissioning model for NWJCC-commissioned cardiac surgery and TAVI activity
2. Development of a Cardiac Surgery Service Specification that recognises the need for certain cardiac conditions to be treated by surgeons who are specialists in that area (per GIRFT recommendations and supported by the Society for Cardiothoracic Surgery).

To date, the following objectives of Phase 2 have already been completed:

- A population needs assessment
- A Cardiac Surgery Service Specification has been developed in conjunction with clinical input from all three NWJCC-commissioned Cardiac Surgery Centres and this has been subject to a formal consultation. Following the feedback received from stakeholders a revised version was produced and agreed by the NWJCC Policy Group, and the document was published in July 2025.

Scope

In Scope

- Review of the commissioning and delivery of Cardiac Surgery and TAVI services commissioned through NWJCC
- Demand and Capacity analysis informed by population health need
- Development, consultation, and refinement of a Cardiac Surgery Service Specification
- Provider Self-Assessment against the agreed service specification
- Options Appraisal to identify and recommend preferred interim and future commissioning models for cardiac surgery and TAVI services
- Engagement activity to inform decision-making, including patient experience activity, PROMs/PREMs analysis, and staff and public engagement
- Development of evidence-based recommendations to support commissioning decisions through the NWJCC governance structure
- Development of a high-level implementation plan to support transition from service review and planning into delivery, subject to governance approval

Out of Scope

- Elements of Cardiology which have not been explicitly included within the scope of the project
- Delivery of capital build or infrastructure projects
- Detailed workforce implementation planning beyond that required to inform service configuration options
- Commissioning or review of non-cardiac specialised services not explicitly referenced within the scope
- Implementation of service changes prior to formal approval through the relevant governance structures
- North Wales Cardiac Services



Scoping

Dependencies

- Interdependencies with Thoracic Surgery services, acknowledging that Thoracic Surgery is out of scope but may be impacted by future cardiac service commissioning model
- Alignment with national policy, clinical standards, and commissioning frameworks, including GIRFT recommendations and the National Clinical Framework
- Dependencies on clinical, analytical, and organisational capacity across participating Health Boards and partner organisations
- Dependencies on future funding, investment, and capital decisions required to support implementation of agreed service models

Risks & Constraints

- Capacity constraints across commissioning, provider, and clinical teams may limit the pace at which work can be progressed
- Availability of analytical data affect the timing and sequencing of demand and capacity activity
- Financial and capital constraints may limit the feasibility or pace of implementation of future service configurations
- Dependencies on partner organisations and external stakeholders may introduce factors outside the direct control of the project
- Delivery of later phases is dependent on formal governance approval and may be subject to wider organisational or system priorities

Deliverables

List the main tangible outputs or products that will be produced by this activity (e.g., recommendations report, service specification, review findings, training materials).

- Report with future commissioning model recommendations for consideration through the NWJCC governance structure - **end Q3**
 - Work with Shared Services to reduce TAVI device costs - **Q1/Q2**
 - Review of use of different TAVI devices across providers - **Q2/Q3**
 - Provider self-assessment against the Cardiac Surgery Service Specification - **Q1/Q2**
 - Demand and capacity modelling for Cardiac Surgery and TAVI services, in partnership with Cardiff University - **Q2/Q3**
 - Options Appraisal identifying preferred interim and future commissioning models for Cardiac Surgery and TAVI activity - **Q2/Q3**
 - Patient experience, PROMs/PREMs analysis, and staff and public engagement findings - **Q3**

Lifecycle Phases & Target Dates

Use this table to show the main phases of your activity, from concept to review. Enter the expected target date for each phase to give a clear overview of when major parts of the work should be completed.

Milestone	Concept	Define and Scope	Design and Plan	Deliver	Close	Review & Learn
April 2026		April 2026	May 2026	April 26– March 27	March 2027	



Scoping

Intended Outcomes & Success Measures

Describe what will be achieved and how success will be measured (e.g., recommendations accepted, service improved, targets met, actions implemented).

To provide a report for NWJCC on recommendations for an optimal commissioning model and develop an implementation plan for the commissioning of Cardiac Surgery and TAVI to ensure that all patients in South Wales have timely and equitable access to a safe and sustainable service.

Governance Roles

List the key roles and individuals responsible for providing strategic oversight, leadership, governance and delivery coordination for this activity. Collectively, these roles will form the core governance and project board structure supporting oversight, decision-making and progression of the work.

Role	Identified Person	Part of Board
CEO	Philip Kloer	✓
SRO	Melanie Wilkey	✓
Delivery Lead	Susan Kedward	✓
Project Manager	Sian Lewis	✓

Stakeholders

List any individuals or groups already identified as important to involve, consult, or inform for this activity. This helps ensure early engagement and awareness.

Name	Organisation	Role
Philip Kloer	HDUHB	CEO Sponsor
Melanie Wilkey	NWJCC	NWJCC SLT Sponsor (Chair)
Susan Kedward	NWJCC	Delivery Lead (Head of Commissioning)
Robert Holcombe	ABUHB	CCLG Representative
Dr Philip Campbell	ABUHB	Clinical Lead(s)
Gwen Kohler	NWJCC	NWJCC Finance Representative
Sian Lewis	NWJCC	Project Manager
Cardiac Project Team	NWJCC/SBUHB/CVUHB	