



Scoping

SUSTAINABILITY & EFFICIENCY

CEO Sponsor

Juliette Brown

SRO

Stacey Taylor

Delivery Lead

Alex Crawford

Summary

Expected Start Date

Q1

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.

To develop and deliver a Sustainability & Efficiency programme for the Joint Commissioning Committee (JCC), in the context of increasing financial pressures and delivery expectations set out in the Annual Plan. This includes priorities to maximise cost improvement efficiencies and savings to improve the additional financial requirement of £16.2m in year and will monitor and assess in-year emerging cost pressures.

Background / Context

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

The financial outlook for NHS Wales is well understood by colleagues to be challenging with the vast majority of Health Boards in Wales unable to produce a balanced plan, even with significant savings targets. In approving the JCC Annual Plan, alongside a requirement to work collaboratively with providers to find a 2% savings target in 2026/27 (in addition to their already challenging savings targets in Wales), the Joint Committee was clear that the remaining financial gap of £16.2m should be closed as far as possible through targeted savings and efficiency programmes.

A workshop was held in March 2026 with NWJCC colleagues to explore options for establishing a programme to oversee the identification and delivery of both JCC and provider savings opportunities. The session was explicitly positioned as a scoping and exploratory workshop, rather than a forum for final decisions, with the intention of informing a future programme or project brief for Senior Leadership Team (SLT) consideration. It was generally acknowledged that there is a need to step back from day-to-day operational pressures to consider how the organisation can become financially sustainable over the medium to longer term, through the development of a Sustainability & Efficiency programme.



Scoping

Scope

In Scope

- JCC opportunities pipeline and associated work plans and/or projects to realise

Out of Scope

- Commissioning activity to develop collaborative savings plans
- Non-specialised services savings
- Savings attributable to the parts of pathways not commissioned by JCC – although it should be carefully noted the dependency of those parts of the pathways impacted by changes to JCC commissioned services.

Dependencies

- Dependency on timely access to pathway data, agreed baselines, and consistent clinical input to confirm scope and priorities.
- Alignment with national policy, clinical standards, and commissioning frameworks.
- 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.
- Collaborative working with Health Board colleagues and strong relationship management
- Interdependency with Strategic Reviews, Deep Dives and Enabling Projects

Risks & Constraints

- Risk of slippage if stakeholder availability constrains preparation and decision-making between checkpoints.
- 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.



Scoping

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).

- Collate insights and outputs from the 'Value and Sustainability' workshop to inform the development of an initial programme or project brief for further consideration by SLT. – **Q1**
- Establish projects which will deliver savings by end of **Q1**
- Produce a pipeline of in year and future year opportunities in **Q2**, with clear assessment of deliverability and confidence
- Commission external support as required - **tbcc**
- Produce a clear, coordinated process detailing how the organisation can become financially sustainable over the medium to longer term, that brings together financial, commissioning, and service considerations in a transparent and agreed way. – **Q4**

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	April 2026	May 2026	February 2027	February 2027	March 2027

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).

- The development of a clear sustainability and efficiency programme
- The ability to utilise this programme as a core mechanism for responding to the requirement that the JCC demonstrates how it will remain financially sustainable in future years.
- Sight to a sustainable savings plan which informs the IMTP 2027-30 financial plan

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 Sponsor	Hayley Thomas	✓
SRO	Stacey Taylor	✓
Delivery Lead	Alex Crawford	✓
Lay Member	Nia Roberts	✓
Project Manager	Dave Williams	✓



Scoping

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
Stacey Taylor	NWJCC	Director of Finance and Information (SRO)
Alexander Crawford	NWJCC	Deputy Director of Corporate Planning & PMO
James Evans	NWJCC	Programme Manager
George Galletly	NWJCC	Director of Corporate Planning & Strategy
Ross Whitehead	NWJCC	Director of Commissioning for Ambulance Services & 111
Gwen Kohler	NWJCC	Deputy Director of Finance
Alex Thomson	NWJCC	Head of Information and Performance
Melanie Wilkey	NWJCC	Director of Commissioning for Specialised Services
Helen Ashcroft	NWJCC	Deputy Director of Commissioning for Specialised Services
Angharad Boundford	NWJCC	Assistant Director of Commissioning
Gavin Owen	NWJCC	Deputy Director of Commissioning for Ambulance and NHS 111
Daniel Lewis	NWJCC	Business Information Manager
Adele Roberts	NWJCC	Assistant Director of Nursing and Quality
Kendal Smith	NWJCC	Finance Partner - Financial Planning
Joel Tofton	NWJCC	Head of Financial Reporting & Business Partnering
Deborah Kingsbury	NWJCC	Assistant Director of Commissioning - Ambulance Services and 111