

Sandwell and West Birmingham Hospitals NHS Trust
Midland Metropolitan Hospital Project
Outline Business Case

Appendix 13a – Post Project Evaluation

Post Project Evaluation Plan – Draft Template

1.0 Methodology for Evaluating the Project and Procurement Stage

Attribute to be Evaluated	Timing	Method of Evaluation	Evaluators
Effectiveness of the Project Team			
<ul style="list-style-type: none"> • Robustness of the Team • The right skills were in place • The team were properly resourced • Outputs were delivered in a timely way • Outputs were of a high quality • Communication was satisfactory • Change was well managed • Reporting on progress was satisfactory • The internal Trust organisation was supportive of the Team • Internal consultation was well managed • Commercial confidentiality was respected • Advisors were well managed • Appropriate feedback was given • Sufficient contact was provided to users during the process • Overall impressions of the project delivery • Aspects were particularly well managed • Aspects where there was room for improvement 	<p style="text-align: center;">Within 6 months of financial close</p>	<ul style="list-style-type: none"> • Structured questionnaire • Face to face interviews 	<ul style="list-style-type: none"> • Trust Board and Management Teams • Project Team • External advisors • Trust user groups • Trade union representatives • Final two PFI bidders • Strategic Health Authority • Local Primary Care Trusts • Department of Health PFU

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Attribute to be Evaluated	Timing	Method of Evaluation	Evaluators
Project Documentation			
<ul style="list-style-type: none"> • Content • Presentation and style • Substance • Clarity • Timeliness of document issue • Overall usefulness • Structure • Aspects which were exemplars • Aspects where there was room for improvement 	<p>Within 6 months of financial close</p>	<ul style="list-style-type: none"> • Structured questionnaire 	<ul style="list-style-type: none"> • Trust Board and Management Teams • Project Team • External Advisors • Shortlisted PFI Bidders • Department of Health PFU
Communications and Involvement During Procurement			
<ul style="list-style-type: none"> • Internal consultation well managed • External consultation well managed • Timeliness of communications • Effectiveness of involvement sought • Aspects which were undertaken well • Aspects where there were room for improvement 	<p>Within 6 months of financial close</p>	<ul style="list-style-type: none"> • Structured questionnaire 	<ul style="list-style-type: none"> • Trust Board and Management Teams • Project Team • Shortlisted PFI Bidders • Local PCTs • User Groups • TU Representatives • Patient Groups

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Attribute to be Evaluated	Timing	Method of Evaluation	Evaluators
Effectiveness of Advisors			
<ul style="list-style-type: none"> • Quality of advice • Timeliness of advice • Value for Money • Problem Solving • Accessibility • Overall contribution • Areas of exemplary performance • Areas for improvement 	<p>Within 6 months of financial close</p>	<ul style="list-style-type: none"> • Structured questionnaire 	<ul style="list-style-type: none"> • Trust Board and Management Teams • Project Team • Shortlisted Bidders • Department of Health PFU
Effectiveness of NHS Guidance			
<ul style="list-style-type: none"> • Comprehensiveness • Comprehensibility • User-friendliness • Addresses key issues well • Areas which are exemplary • Areas for improvement 	<p>Within 6 months of financial close</p>	<ul style="list-style-type: none"> • Structured questionnaire 	<ul style="list-style-type: none"> • Project Team • External Advisors
Support from Department of Health			
<ul style="list-style-type: none"> • Responsive • Timely • Supportive • Pro-active • Facilitative 	<p>Within 6 months of financial close</p>	<ul style="list-style-type: none"> • Structured questionnaire 	<ul style="list-style-type: none"> • Project Team • External Advisors • PFI Partner

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Attribute to be Evaluated	Timing	Method of Evaluation	Evaluators
FBC and Procurement Process			
<ul style="list-style-type: none"> Identify overall costs of PFI process Review timetable to achieve financial close Review planned development against strategic objectives Production of FBC and availability 	<p>Within 6 months of financial close</p>	<ul style="list-style-type: none"> Audit Benchmark against plan and other schemes Structured Questionnaire Timeliness after financial close 	<ul style="list-style-type: none"> Project Team Director of Finance Trust Board

2.0 Methodology for Evaluating the Construction and Commissioning Stage

Attribute to be Evaluated	Timing	Method of Evaluation	Evaluators
Construction Preview			
<ul style="list-style-type: none"> Research construction PPEs from other PFI schemes 	<p>Approx 8 months after financial close</p>	<ul style="list-style-type: none"> Collection and collation of key learning points 	<ul style="list-style-type: none"> Project Team
<ul style="list-style-type: none"> Determine approach to transferring lessons from other schemes 	<p>Approx 9 months after financial close</p>	<ul style="list-style-type: none"> Internal Team Meeting 	<ul style="list-style-type: none"> Project Team
<ul style="list-style-type: none"> Stakeholder Day 	<p>Approx 10 months after financial close</p>	<ul style="list-style-type: none"> Day workshop with managers of other schemes 	<ul style="list-style-type: none"> Project Team

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Attribute to be Evaluated	Timing	Method of Evaluation	Evaluators
Final Design Process Sign Off			
<ul style="list-style-type: none"> • Compliance to full brief • Analysis of any change controls required during final design phase, and establish costs 	Approx 1 year after financial close	<ul style="list-style-type: none"> • Structured Questionnaire (on completion of design) 	<ul style="list-style-type: none"> • Project Board
Final Handover of Building			
<ul style="list-style-type: none"> • Compliance to project brief • Compliance to health & safety • Compliance to fire regulations • Compliance to clinical clean requirements 	Within 6 months of completion of building programme		<ul style="list-style-type: none"> • Independent Advisor
Completion of Commissioning			
<ul style="list-style-type: none"> • Compliance to health and safety • Compliance to fire regulations • Compliance to infection control standards • Clinical and operational risk management outcomes • Identify costs, including delays, change controls, and unforeseen expenditure • Record overall progress against timetable • Complete patient satisfaction survey • Complete staff satisfaction survey 	Within 6 months after commissioning		<ul style="list-style-type: none"> • Independent Advisor • Chief Operating Officer / Nurse Director

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Attribute to be Evaluated	Timing	Method of Evaluation	Evaluators
Final Contract Review			
<ul style="list-style-type: none"> • Full lifecycle financial outcomes • Non financial benefits • Risk management • Building maintenance conditions • Costs to maintain building beyond contract to 60 year life • Consort performance • Service provider’s performance • Contract management costs 	<p>18 months from opening of new facility</p>	<ul style="list-style-type: none"> • Full Report 	<ul style="list-style-type: none"> • Trust Board
<ul style="list-style-type: none"> • Staff satisfaction • Patient satisfaction • Purchaser satisfaction 		<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> •

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3.0 Methodology for Evaluation the Project and Procurement Stage

Attribute to be Evaluated	Timing	Method of Evaluation	Evaluators
Staff Transfer Review			
<ul style="list-style-type: none"> Assess against objectives of Trust’s handover programme Assess against objectives of Consortium’s mobilisation programme Identify costs 	Within 6 months from commissioning	<ul style="list-style-type: none"> Internal interview 	<ul style="list-style-type: none"> Project Director Director of Human Resources
Financial Audits			
<ul style="list-style-type: none"> Progress against annual predictions Trust’s finances remain in balance Achievement of Trust’s identified savings 	Annual	<ul style="list-style-type: none"> Rolling programme financial reviews of benefits achievements 	<ul style="list-style-type: none"> Director of Finance
Risk Reviews			
<ul style="list-style-type: none"> Costs attributed to any identified and unidentified risks occurring Analysis of risks identified against occurrence (see risk analysis for details) Analysis of unidentified risks against occurrence 	Annual	<ul style="list-style-type: none"> Rolling programme of reviews of risk management strategy 	<ul style="list-style-type: none"> Contract Manager

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Attribute to be Evaluated	Timing	Method of Evaluation	Evaluators
Non Financial Benefits Review			
<ul style="list-style-type: none"> • Analysis of benefits measurement achievements against targets (see Benefits Realisation plan for details) • Identify any unforeseen benefits achieved • Complete of patient satisfaction surveys • Complete staff satisfaction surveys • Analysis of staff attrition scores 	Annual	<ul style="list-style-type: none"> • Rolling programme of review of benefits achieved against plan 	<ul style="list-style-type: none"> • Trust Board
FM Service Performance Reviews			
<ul style="list-style-type: none"> • Part of monthly service contract monitoring reviews 	Monthly	<ul style="list-style-type: none"> • Reviews to ensure service performance against payment streams 	<ul style="list-style-type: none"> • Contract Manager
Ongoing Building Maintenance Lifecycle Costs			
<ul style="list-style-type: none"> • Monitor ongoing operating costs against predicted lifecycle costs • Identify maintenance or service costs not within the contract that are value for money 	Annual	<ul style="list-style-type: none"> • Financial cost maintenance analysis 	<ul style="list-style-type: none"> • Contract Manager
Review of Operation Performance against Plan			
<ul style="list-style-type: none"> • Activity (actual vs plan) • Clinical performance (actual vs plan) • Capacity and throughput • Appraisal of new service models 	3 years after opening of new hospital	<ul style="list-style-type: none"> • Full review against FBC projections 	<ul style="list-style-type: none"> • Trust Board