Supporting Statement for Calderdale, Kirklees and Wakefield Older People's Mental Health Inpatient Transformation Business Case

South West Yorkshire Partnership Foundation Trust (SWYPFT) has confirmed the following:

- That the OPS inpatient transformation scheme is their capital priority as identified in their Trust Estate Strategy. This forms the Trust key scheme within the developing WY ICB infrastructure plan.
- Based upon current agreed capital allocation methodology this is contained within the SWYPFT allocation. The capital programme is scheduled to accommodate this scheme without creating additional estates risks.
- The Trust will be using its own cash reserves and therefore does not require cash support from the ICB.

In addition, the ICB can confirm:

- The agreed methodology for capital allocation would need to change from the current model to have a direct impact on other Trusts.
- During 2024/25, the WY infrastructure plan has been developed and agreed, with this programme identified as a priority.

In late 2023, the NHS WY ICB confirmed prioritisation of this scheme from a system capital & estates perspective. This was on the basis that the forecast capital expenditure for the programme is £8.2m and will be spent across the 2024/25 and 2025/26 financial years.

In 2024, wider system challenges have emerged. However, based on proposed costs remaining as planned, it is our expectation that SWYPFT will receive the capital allocation they require to deliver the programme, factoring in their prioritisation of the programme and plans to spread costs across financial years.

The ICB is committed to delivering MHIS in line with NHSE expectations. The ICB can confirm that this is our priority for funding future MHIS and forms the basis of financial planning. As this will be apportioned across place it does not represent the entirety of the MHIS and will allow other investment.

The incremental revenue impact for SWYPFT and Calderdale, Kirklees and Wakefield place is c. £1m in total, which is approximately 5.1% of the WYICB MHIS growth for 2024/25.

The revenue costs will be phased, in agreement between system partners, with current modelled part year effect costs from 2025 / 26. As system partners, we have agreed that if Mental Health Investment Standard funding continues that the Older Peoples transformation programme is initially prioritised to meet the revenue costs over the agreed period. SWYPFT and ICB will risk share any increases in costs that emerge as a direct result of the programme.

The business case for the transformation evidences that the investment, whilst improving operational services, quality and safety, it also helps to mitigate a number of other risks including financial pressures arising from the current structure, in particular increasing costs associated with keeping patients with high acuity dementia safe in an isolated site. This will help support the overall financial sustainability for SWYPFT.

The Trust has confirmed that it is continuing to develop its medium-term financial sustainability plan, in line with the wider development within the ICB, and is taking actions to ensure delivery of this and the 24 / 25 in year breakeven target. This includes review and support of all guidance and advice.

Jonathan Webb
Director of Finance/Deputy Chief Executive
West Yorkshire Integrated Care Board

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