GIG CYMRU NHS WALES
Bwrdd Iechyd Prifysgol Bae Abertawe
Swansea Bay University Health Board

Performance & Finance Committee Primary Care Community & Therapies Service Group

23rd September 2025

Un Bae Ar y Cyd
One Bay Way

Agenda Detail

Health Board & Service Group Financial Summary

In-Month Revenue Position

Key Drivers

Savings Performance

Risks, Next Steps & Mitigating Actions

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Un Bae Ar y Cyd
One Bay Way

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SUMMARY

BUDGET VARIANCE

	In Mth Plan £M	In Mth Perf £M	In Mth v Plan £M	YTD Plan £M	YTD Perf £M	YTD v Plan £M
Health Board	4.9	6.0	1.1	24.5	37.8	13.3
Service Group	-	0.2	0.2	-	2.4	2.4

SAVINGS PERFORMANCE

	In Mth Target £M	In Mth Delivery £M	In Mth v Plan £M	YTD Target £M	YTD Delivery £M	YTD v Plan £M	Annual Target £M	Annual Fcast Delivery £M	Annual Fcast v Plan £M
Health Board	4.6	3.3	-1.3	23.1	7.2	-15.9	55.4	25.8	-29.6
Service Group	1.1	0.9	-0.2	5.4	1.2	-4.2	13.0	5.5	-7.5

PAY ACTUAL

Total Pay	Total 24/25 £M	Avg 24/25 £M	In Month £M	YTD £M
Admin & Clerical	11.4	0.9	1.1	5.0
Medical & Dental	12.7	1.1	1.1	5.1
Nuring & MidwiferyRegistered	30.4	2.5	3.1	13.4
Add Prof Scientified and Techincial	2.4	0.2	0.2	1.1
Additional Clinical (Include Nursing Unqualified)	18.9	1.6	1.9	8.4
AHPs	35.4	2.9	3.6	15.9
Healthcare Scientists	1.6	0.1	0.2	0.7
Estates and Ancillary	0.0	0.0	0.0	0.0
TOTAL PAY	112.7	9.4	11.3	49.8

NON PAY ACTUAL

Type Non Pay	Total 24/25 £M	Avg 24/25 £M	In Month £M	YTD £M
PRIMARY & SECONDARY CARE	191.1	15.9	15.4	77.2
CLINICAL SERVICE & SUPPLIES	7.9	0.7	0.5	3.1
GENERAL SUPPLIES & SERVICES	0.2	0.0	0.0	0.1
ESTABLISHMENT EXPENSES	2.3	0.2	0.2	0.7
PREMISES & FIXED PLANT	2.8	0.2	0.2	1.1
PURCHASE OF HEALTH CARE SERVICES	0.3	0.0	-	-
EXTERNAL CONTRACT STAFFING & CONSULTANCY	0.2	0.0	0.0	0.1
MISCELLANEOUS SERVICES	-2.6	-0.2	-0.2	-1.1
SERVICES FROM OTHER NHS BODIES	0.4	0.0	-0.0	0.1
TOTAL	202.6	16.9	16.1	81.4

Summary Health Financial Plan & Service Group Element

Financial Plan	SBU £M	PCCT SG £M
Opening Underlying Deficit Funding	**92.5**	**9.8**
Growth / Inflation		
National Cost Pressures - core	4.1	0.0
Local Inflation Cost Pressures	16.2	3.3
Local Growth Cost Pressures	13.5	1.0
Sub Total	**33.7**	**4.3**
Commissioning		
Commissioner	6.8	0.0
Provider	(3.8)	0.0
SLA	0.1	0.0
Sub Total	**3.1**	**0.0**
WG Funding	**(15.2)**	**0.0**
Savings 2025/26	**(55.4)**	**(13.0)**
FINANCIAL PLAN & BUDGETARY CHANGES	**58.7**	**1.1**

PCCT SG BUDGET £M

Rollover Budget @ 24th March 2025
279.2

+

Opening Underlying Funding
9.8

+

Funding Growth/Inflation
4.3

+

Savings Target
(13.0)

=

Opening Budget 25/26
280.3

Un Bae Ar y Cyd
One Bay Way

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Bwrdd Iechyd Prifysgol Bae Abertawe
Swansea Bay University Health Board

2025/6 In Year Health Board Position & Service Group Element

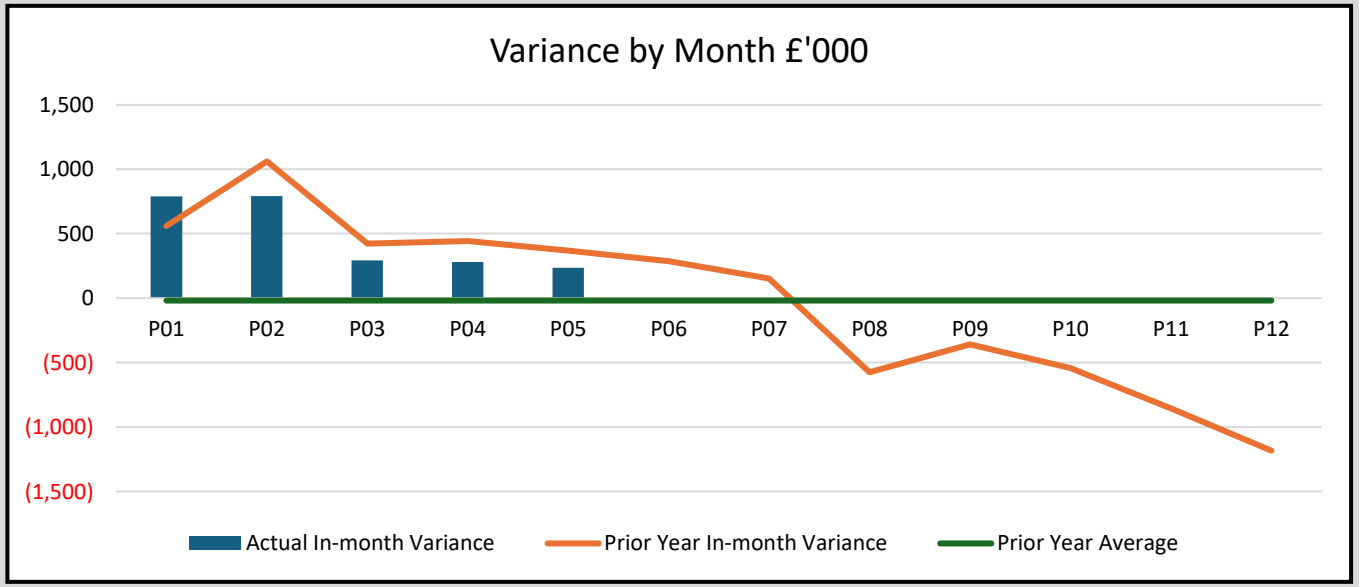
Part Plan	Detail	Orignial Plan for 2025/26	Actual Variance					
		£'000	Mth 1 £'000	Mth 2 £'000	Mth 3 £'000	Mth 4 £'000	Mth 5 £'000	YTD £'000
Part 1: Plan								
	Z082 Opening Plan	58,660	4,888	4,888	4,888	4,888	4,888	24,442
	In Year Adjustments	0						0
Opening Plan	Revised Plan	58,660	4,888	4,888	4,888	4,888	4,888	24,442
	Total Part 1	58,660	4,888	4,888	4,888	4,888	4,888	24,442
Part 2: Performance Delegated Budgets								
Service Groups	Mental Health & LD	0	1,244	1,334	1,559	1,445	1,209	6,791
	Morriston	0	1,591	1,372	1,135	575	486	5,159
	NPT & Singleton (inc PC Prescribing)	0	744	213	430	877	492	2,756
	PC & Community	0	789	792	293	281	237	2,392
	Sub Total	0	4,368	3,711	3,417	3,178	2,424	17,098
Corporate Directorates	Board Secretary	0	(50)	8	(72)	32	(29)	(111)
	Chief Operating Officer	0	173	(26)	61	157	151	516
	Director of Strategy (Nicole)	0	(22)	(37)	(34)	34	(35)	(94)
	Director of Strategy (LTA Contracting CS)	0	(79)	(83)	(63)	(49)	(191)	(465)
	Director of Strategy (RIF)	0	0	0	0	0	0	0
	Estates Only (Inc PFI)	0	(52)	(76)	(82)	(396)	(193)	(799)
	Finance, Capital Planning, CF & R&S	0	(58)	(73)	(158)	(36)	(105)	(430)
	Digital	0	(197)	(238)	(333)	(343)	(233)	(1,344)
	Medical Director	0	(16)	(10)	(11)	(17)	(32)	(86)
	Nurse Director	0	(31)	(72)	(58)	(202)	(101)	(464)
	Workforce & OD	0	(106)	(24)	(95)	99	90	(36)
	DICE	0	(38)	(32)	(37)	(34)	(31)	(172)
	Director of Therapies	0	(15)	(16)	(27)	(19)	(18)	(95)
	Public Health	0	(101)	(107)	(50)	(58)	(131)	(447)
	Clinical Medical School	0	0	0	0	0	0	0
	Research & Development	0	0	0	0	0	0	0
	EMRTS	0	21	(31)	(63)	8	114	49
	Sub Total	0	(571)	(817)	(1,019)	(824)	(744)	(3,975)
	Total Part 2	0	3,797	2,894	2,398	2,354	1,680	13,123
Part 3: Central Cost Centres (Z Codes exc Z030)								
	Total Part 3	0	317	260	111	852	(105)	1,435
Part 4 Reserves Unutilised Z030								
	Total Part 4	0	0	0	(275)	(484)	(483)	(1,242)
Total Performance Against RRL								
	Deficit /(Surplus) Against RRL	**58,660**	**9,003**	**8,042**	**7,123**	**7,611**	**5,980**	**37,756**

Service Group Position By Month & Divisions

Period	In Month Budget £'000	In Month Actual £'000	In Month Variance £'000
Mth 01	23,514	24,303	789
Mth 02	23,807	24,597	791
Mth 03	23,741	24,034	293
Mth 04	25,002	25,283	281
Mth 05	25,688	25,924	237
Mth 06			
Mth 07			
Mth 08			
Mth 09			
Mth 10			
Mth 11			
Mth 12			
Total YT	121,751	124,142	2,390

Sub Service Group Level	In Month Budget £'000	In Month Actual £'000	In Month Variance £'000
Service Group Management	(141)	85	227
Therapies & Health Sciences	4,552	4,379	(172)
Medical Director	295	213	(81)
Nurse Director	9,060	9,388	328
Primary Care Associate Director	11,653	11,602	(50)
Associate Director Operations	270	256	(14)
Total	**25,688**	**25,924**	**237**

Sub Service Group Level	YTD Budget £'000	YTD Actual £'000	YTD Variance £'000
Service Group Management	(3,501)	350	3,851
Therapies & Health Sciences	19,642	19,205	(437)
Medical Director	1,247	1,079	(168)
Nurse Director	45,216	44,801	(415)
Primary Care Associate Director	58,003	57,597	(406)
Associate Director Operations	1,144	1,109	(35)
Total	**121,751**	**124,142**	**2,390**



KEY MESSAGES

- Month 5 overspend is £0.2m. Year to Date overspend is £2.4m.
- Key overspends in month 5:
  - Gorseinon £107k in month, £483k YTD – this is due to additional beds and high sickness
  - District Nursing £135k overspend in month, £315k overspend YTD – high sickness resulting in high variable pay spend (no sickness cover in establishment)
  - Ty Olwen £22k in month, £167k YTD – sickness cover
  - Pharmacy Contract £24k in month, £119k YTD – pressure from common ailments drugs – discussions with Medicines Management to discuss budget transfer have been set up
- These pressures are offset by underspends in:
  - CHC is £313k over spent in month, £23k underspent YTD. Backdated CIP and a reduction in patient numbers versus expected CHC growth profile.
  - LAC £80k underspend in month, £255k YTD – discussions with LAs have resolved a lot of disputed cases. Underlying Deficit (ULD) funding reviewed in M5 and reduced by £0.5m against CIP. Will be reviewed again in Q3.
  - Vacancies – Substantive pay is £2.6m under spent YTD. Variable pay spend is 1.6m YTD. The net benefit vacancies is £1m YTD and £114k in month 5
  - Unallocated Reserves - £237k YTD
- CIP. £0.2m unachieved in month. £4.2m unachieved YTD.

Year-To-Date Service Group Position By Division & Type Expenditure/Income

In Month Variance by Area and Expenditure Type	£'000 Service Group Management	Therapies & Health Sciences	Medical Director	Nurse Director	Primary Care Associate Director	Associate Director Operations	Total
INCOME FROM ACTIVITIES	**0**	**91**	**(16)**	**0**	**488**	**1**	**565**
LOCAL HEALTH BOARDS	0	41	2	6	2	1	52
NHS TRUSTS - WELSH	0	(1)	(19)	(0)	(7)	(0)	(27)
ENGLISH FOUNDATION NHS TRUSTS	0	0	0	4	0	0	4
LOCAL AUTHORITIES	0	56	0	(4)	29	0	81
WELSH GOVERNMENT	0	(2)	0	0	0	0	(2)
PRIVATE PATIENTS	0	0	0	(0)	0	0	(0)
OTHER INCOME FROM ACTIVITIES	0	(2)	0	(4)	3	0	(4)
DENTAL INCOME	0	0	0	0	461	0	461
OTHER OPERATING INCOME	**0**	**(2)**	**(2)**	**(2)**	**23**	**0**	**16**
EDUCATION & TRAINING	0	(2)	(2)	(2)	(3)	0	(9)
CHARITABLE & OTHER CONTRIBUTIONS	0	(1)	0	0	0	0	(1)
NON-PATIENT CARE INCOME GENERATION	0	2	0	0	0	0	2
ACCOMMODATION AND CATERING	0	0	0	0	(0)	0	(0)
OTHER INCOME	0	(1)	0	0	25	0	25
NON PAY	**3,844**	**(95)**	**(45)**	**(228)**	**(596)**	**(56)**	**2,826**
PRIMARY & SECONDARY CARE	(81)	(5)	0	(333)	(488)	0	(907)
CLINICAL SERVICE & SUPPLIES	0	(81)	0	4	(70)	2	(145)
GENERAL SUPPLIES & SERVICES	0	(0)	0	12	(3)	(5)	3
ESTABLISHMENT EXPENSES	0	(12)	(1)	(4)	6	(2)	(13)
PREMISES & FIXED PLANT	0	(3)	(0)	73	(61)	(30)	(21)
EXTERNAL CONTRACT STAFFING & CONSULTANCY	0	0	0	7	(1)	0	6
MISCELLANEOUS SERVICES	3,925	7	0	11	20	0	3,963
SERVICES FROM OTHER NHS BODIES	0	(0)	(44)	2	2	(21)	(61)
PAY	**7**	**(431)**	**(106)**	**(185)**	**(321)**	**21**	**(1,016)**
ADMINISTRATIVE & CLERICAL	(6)	(68)	(0)	(130)	(48)	(40)	(293)
MEDICAL AND DENTAL	(0)	(9)	(99)	(67)	(126)	46	(256)
NURSING AND MIDWIFERY REGISTERED	0	(39)	0	(179)	(2)	0	(220)
ADD PROF SCIENTIFIC AND TECHNICAL	0	0	1	(37)	(60)	14	(81)
ADDITIONAL CLINICAL SERVICES	0	(252)	0	314	(107)	(1)	(45)
ALLIED HEALTH PROFESSIONALS	(1)	(669)	0	(227)	(0)	1	(896)
HEALTHCARE SCIENTISTS	0	(3)	0	0	0	0	(3)
ESTATES AND ANCILLIARY	0	(0)	0	0	6	0	6
PAY BUDGET ADJUSTMENTS	14	609	(8)	141	16	(0)	771
Total	**3,851**	**(437)**	**(168)**	**(415)**	**(406)**	**(35)**	**2,390**

Operations – £35k underspend

- Underspends reflect current vacancies in operational team and reductions in spend in GPOOH/UPCC

Medical Director – £168k underspend

- Underspend is due to in vacancies in Medical staff in Palliative care and an in-month adjustment to reflect the reduction in cost of the current WAST paramedics of - £48k following receipt of Q1 invoice.

Nurse Director – £415k underspend

- CHC budgets - £313k overspend. In month payments for retrospective CHC claims of £148k were made impacting on the in month position. In addition, movement of CHC budget related to changes in baseline costs to the CIP line also resulted in an in month overspend against CHC
- District Nursing - £135k overspent in month. £315k overspend YTD on variable pay including sickness
- Additional beds -Gorseinon £107k overspend in month. £483k overspend YTD
- In month there were further benefits on LAC budgets as disputes are resolved at £78k underspent in month

Primary Care Budgets – £406k underspend

- Underspends reflect vacancies within primary care notably in community Dental Services and community psychology posts and GMS contract.
- Except for GDS Dental budgets, the Primary care contracts are currently based on 2024/25 outturn adjusted for non-recurrent benefits included in 2024/25. This reflects the 2 month delay in the payments made to the contracts.
- Dental budgets were adjusted in month 3 to reflect recovery of 2024/25 underperformance against contract payments, resulting in an in month benefit of £102k and bringing the dental position to breakeven ytd.

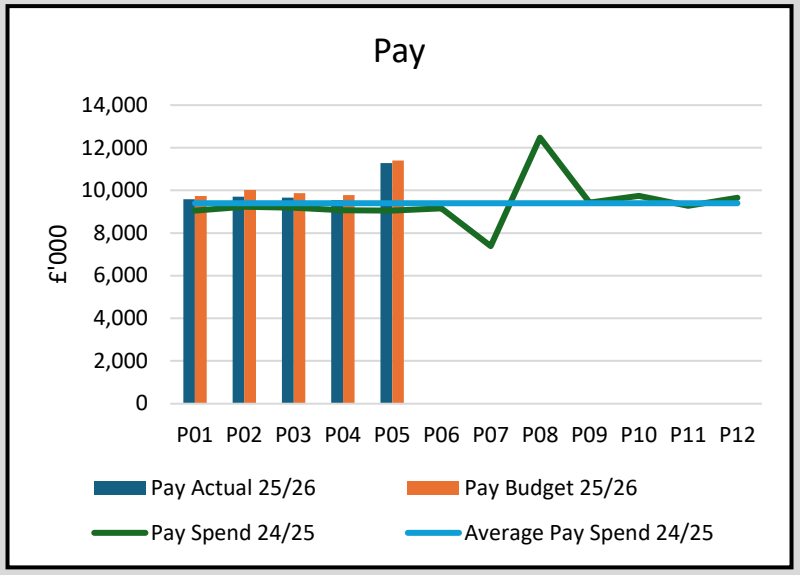
Therapies & Health Sciences – £437k underspend

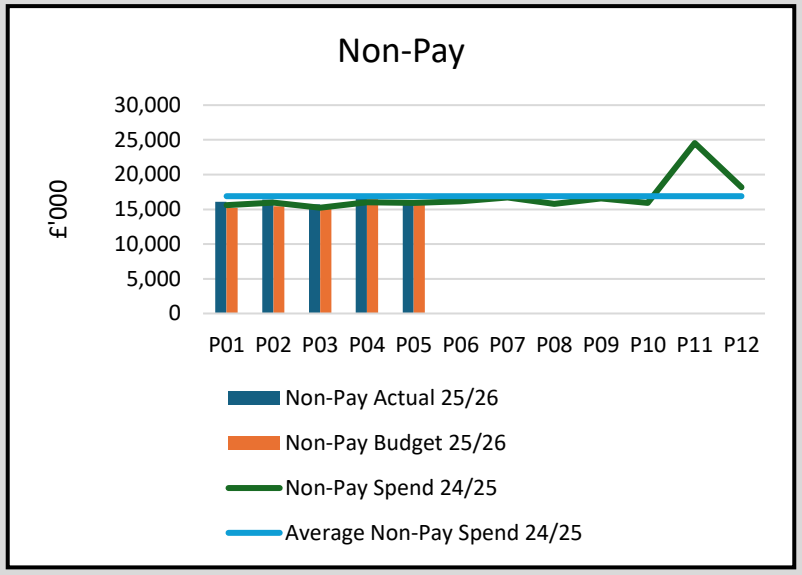
- Underspends reflect YTD vacancies across all disciplines.
- In M05 ULD funding was allocated to physiotherapy to reflect unfunded AMSR posts which contributed to a £66k underspend against physiotherapy budgets in month and adjusting the ytd overspend to £18k

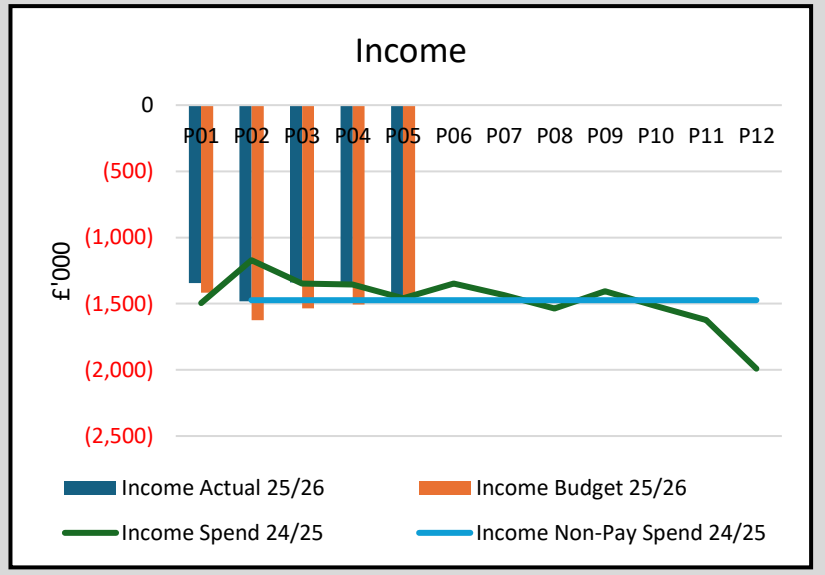
Service Group Management – £3.9m overspend

- CIP targets are currently all coded here offset by any non-recurrent benefits and ULD funding that has not been allocated overspends include £3.93m of undelivered CIP

DRIVERS: SUMMARY





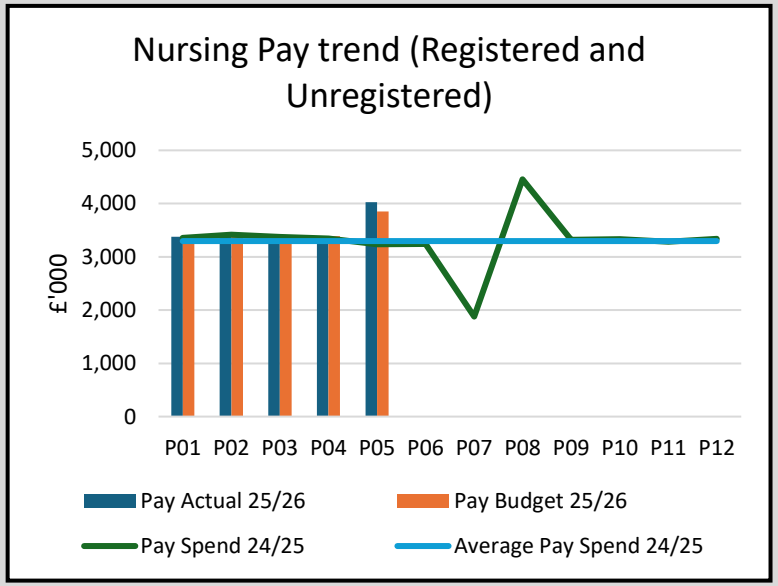


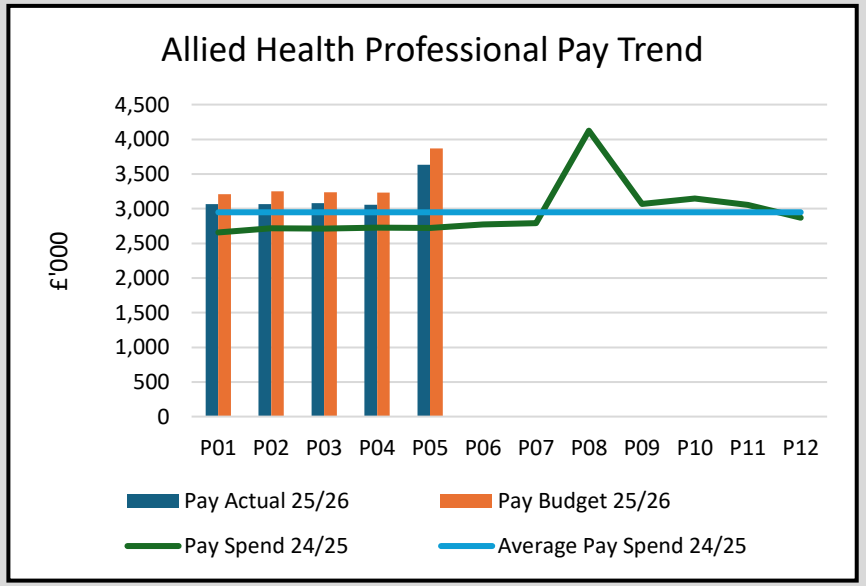
Pay: Monthly expenditure is higher than the 24/25 average. This is mainly driven by the 25/26 Pay award, paid in August, and an increase in HB NI costs. In addition, the average monthly variable pay spend has also increased versus 24/25. The Average WTE have reduced versus 24/25. This is mainly in Nursing but is offset by increases in Therapies. This is not expected to remain due to streamlining during September and October 2025.

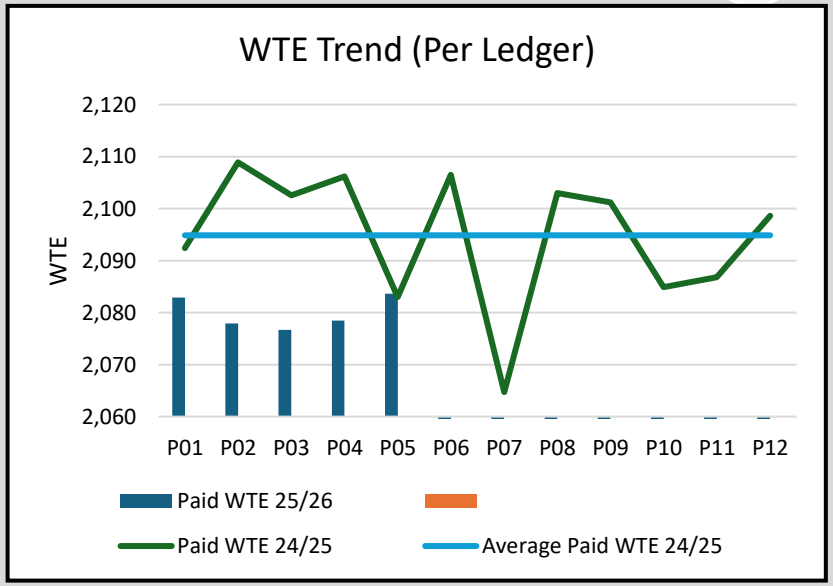
Non-Pay: Monthly expenditure is lower than the 24/25 average but is following the same profile. This is driven by primary care contracts and CHC. Contract costs can vary between quarters which may lead to changes in average spend as the year goes on. CHC costs have been impacted by forensic reviews of packages in place.

Income: Income is above levels for the first part of 24-25 but in line with the profile and average monthly values when considered against the whole year. Most income is linked to specific expenditure on posts and services therefore any changes in income will be offset by associated changes in expenditure.

DRIVERS: PAY

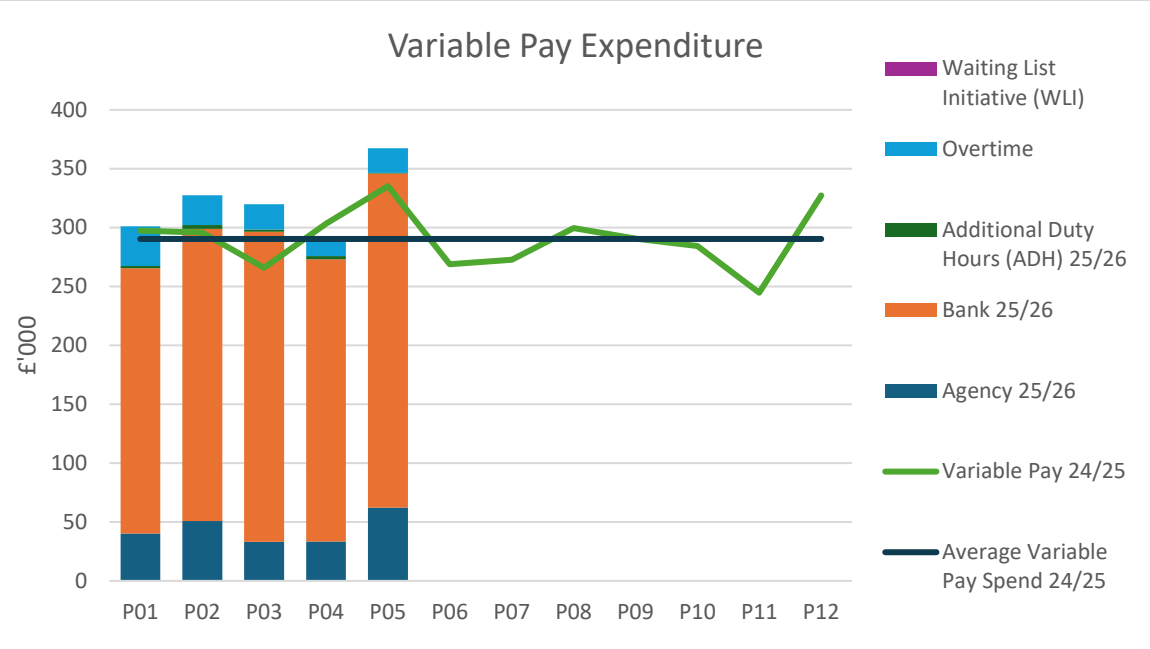






- Registered Nurse (RN) vacancies in 25/26 is averaging £183k per month and HCSW is £55k per month. These are broadly in line with 24/25. Variable pay in RN in 25/26 is averaging £138k per month and HCSW is £133k per month. HCSW is significantly higher than 24/25.
- Excluding covering vacancies. The most significant drivers of variable pay are:
  - Sickness (RN) and acuity (HCSW) in Ty Olwen - £125k
  - Additional capacity in Gorseinon (RN & HCSW) - £460k
  - Sickness and demand in District Nursing (RN & HCSW) - £300k
- AHP Vacancies in 25/26 is averaging £215k per month. Variable pay in AHP in 25/26 is averaging £28k per month. This is slightly higher than 24/25. These are offset by vacancy factors of £105k per month.
- WTE is below the average for 24/25 but is trending upwards. This is expected to grow to 24/25 levels as streamlining staff groups take on cohorts in September and October.

Drivers: Variable Pay & Performance Against 30% WG Reduction target (Actual)

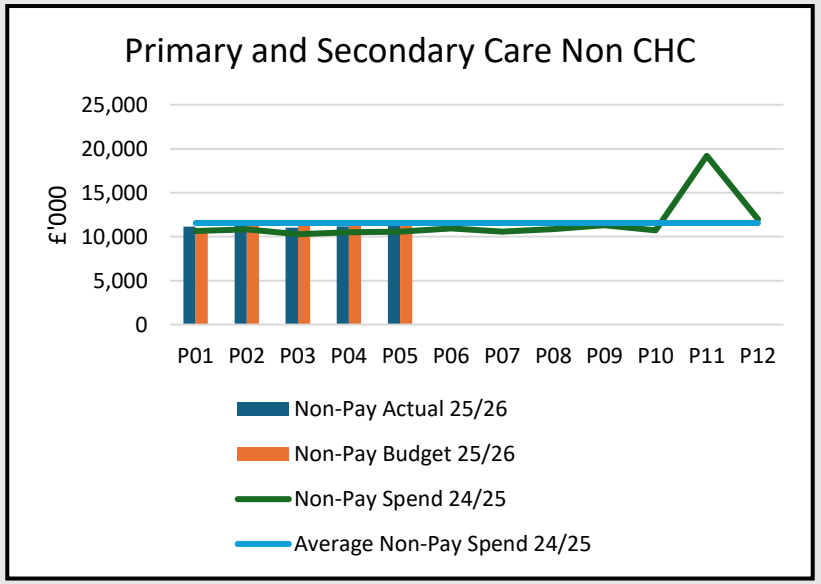


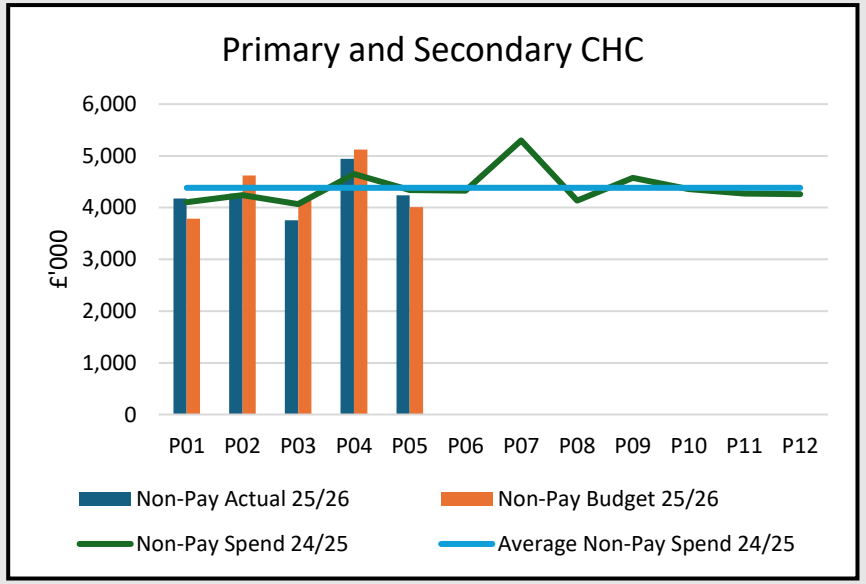
Variable Pay	Total 2024/25 £M	Avg 2024/25 £M	Annual Target 30% Reduction £M	In Month £M	YTD £M
- ADMINISTRATIVE & CLERICAL	0.1	0.0	0.0	0.0	0.1
- NURSING AND MIDWIFERY REGISTERED	1.6	0.1	0.4	0.2	0.7
- ADD PROF SCIENTIFIC AND TECHNICAL	0.0	0.0	0.0	0.0	0.0
- ADDITIONAL CLINICAL SERVICES	1.3	0.1	0.0	0.1	0.8
- ALLIED HEALTH PROFESSIONALS	0.3	0.0	0.2	0.0	0.0
- HEALTHCARE SCIENTISTS	0.0	0.0	-	0.0	0.0
- ESTATES AND ANCILLIARY	0.0	0.0	-	0.0	0.0
TOTAL VARIABLE PAY	**3.3**	**0.3**	**0.6**	**0.4**	**1.6**

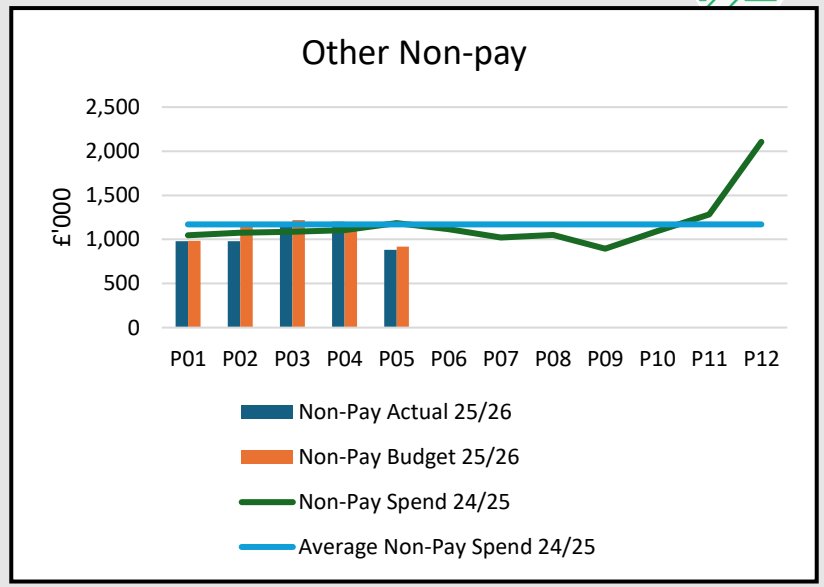
Agency Pay	Total 2024/25 £M	Avg 2024/25 £M	Annual Target 30% Reduction £M	In Month £M	YTD £M
- ADMINISTRATIVE & CLERICAL	0.0	0.0	0.0	0.0	0.0
- MEDICAL AND DENTAL	0.1	0.0	0.1		- 0.0
- NURSING AND MIDWIFERY REGISTERED	0.5	0.0	0.4	0.0	0.1
- ADD PROF SCIENTIFIC AND TECHNICAL	0.0	0.0	0.0	0.0	0.0
- ADDITIONAL CLINICAL SERVICES	0.0	0.0	0.0	0.0	0.1
- ALLIED HEALTH PROFESSIONALS	0.2	0.0	0.2	0.0	0.0
TOTAL AGENCY PAY	**0.9**	**0.1**	**0.6**	**0.1**	**0.2**

- The chart above show the month-on-month expenditure on variable pay.
- Agency spend trend is towards achieving the 30% Ministerial agency spend reduction target set at the beginning of 25/26.
- In M05 the total expenditure on variable pay was £367k compared to £320k in M04, with expenditure on registered and unregistered nursing bank making up the majority.
- Highest spending areas were Gorseinon £120k, District Nursing £98k, Prison £23k, Ty Olwen £26k and Wound Clinic £9k.
- Agency spend in M05 was £62k, an increase compared to M4 position of £33k. The increase is in District Nursing. YTD spend is spend is £219k, split between Podiatry £58k, District nursing £108k, Other Therapies £41k, Other nursing £12k

DRIVERS: NON-PAY (ACTUAL)





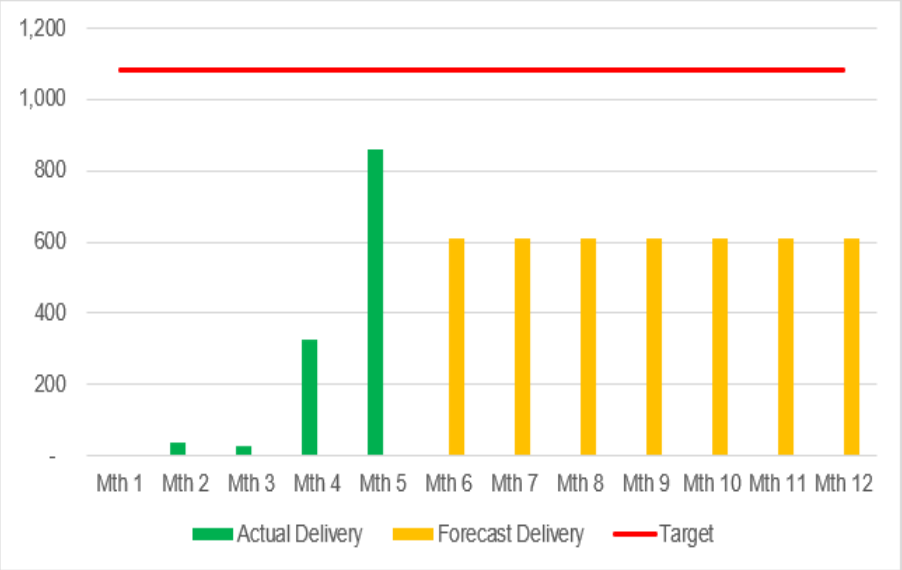


- Primary and Secondary Care Non CHC
  - Primary Care contract spend is below 24/25 and within the funding envelope for 25/26. There is a risk of variation between periods in the financial year but forecasts are not expecting a significant deviation from previous years spend profile
  - There has been a financial benefit from the resolution of long running disputes over the split of costs for Looked After Children with LA partners. Some of these packages have been in existence for over a year which has meant a one off and on-going reduction in expenditure
- CHC
  - Spend is below 24/25 levels and within the funded growth forecast for 25-26.
  - On-going reviews of patients and packages have resulted in more accurate activity data and reduced spend
  - 25-26 backdated Inflation growth funding and payments have been made. The final increase to 25/26 rates will be made in September. This is accounted for in growth funding for 25/26.
- Other Non-pay
  - Spend is below 24/25 levels but in line with funded level. Major spend lines are drugs, clinical consumables, travel and service contracts total £4m. These are currently underspending by £30k per month.

Savings Summary

KEY METRICS	
2025/26 Savings Target	12,983
YTD Target	5,410
YTD Plan (Green & Amber Only)	1,263
YTD Delivery	1,247
Forecast Delivery to 31st March 2026	5,506
Shortfall to Target	7,477

PROFILE DELIVERY 2025/26



Actions / Next Steps

- YTD Delivery is £4.2m short of target.
- All Amber Schemes reviewed and allocated to Amber/Green schedule or moved to pipeline schemes
- All Red Schemes reviewed and moved to Amber/Green schedules, pipeline schedule or removed
- Pipeline schemes value is £167k
- Non-recurrent accountancy gains monitored regularly
- Divisions expected to deliver plan updates at regular Financial Recovery Meetings and to identify further opportunities

Identification Opportunities & Risk

PCT Group: Risks and Opportunities	Best Case/ Additional Opportunities £'000	Value Included in Forecast £'000	Worst Case/ Additional Risks £'000	Comments / Mitigations
Current Forecast Position	**5,818**	**5,818**	**5,818**	**based on M5 including current vacancies/ CIP**
Opportunities				
CIP schemes profile – Full Year forecast	**-1,600**	**-1,344**	**-300**	
NR - LAC further opportunities	**-200**			£500k recognised in M5
CHC further opportunities	**-800**			
GPOOH - National changes to pay rates/ worker status & IR35				Awaiting agreement
GPOOH - reduce to 95% fill rate	**-95**			needs exec agreement re impact on wider HB
R -Reduce beds in Gorseinon to funded levels	**-540**			6 months from Oct - Needs exec agreement re impact on wider HB
Palliative care Nursing - reduce spend to budget	**-100**			Current high level of sickness and reduced 1:1 6 Months
District Nursing - reduce spend to budget	**-273**			Sickness / service demand (6mths)- impact on wider HB
Back office review	**-167**			
Pharmacy Contract				Awaiting WG Pharmacy Framework
Additional Risks				
Appointment of staff into vacancies	**250**	**546**	**1,700**	40 Physio / OT/N&D streamliners starting imminently, plus Podiatrists, SaLT, CRT OTs and Psychology/palliative medical recruited
Audiology hearing aids - purchasing patterns				adjusted M4
Bonymaen Beds			**138**	Share of Bonymaen House increased cost
Joint Equipment Store			**500**	Increased activity
Vaccination rates - increase update to target			**300**	uptake won't be known until Q4
Net Adjustment to Forecast re Risks / Opportunities	**-3,525**	**-798**	**2,338**	
Adjusted Forecast	**2,293**	**5,020**	**8,156**	
Maximum Control Total	0	0	0	
Gap	**2,293**	**5,020**	**8,156**	Further CIP/ NR opportunities to be identified

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Ty Olwen Update

- A review of nursing staff absence at Ty Olwen has identified three staff off long-term sickness, with the most common causes being anxiety, stress, and migraines. Importantly, these conditions have been assessed as non-work-related. There are currently three staff on short term sickness.
- Occupational Health (OH) referrals are being used as a supportive mechanism, with staff advised and referred accordingly. Workforce & OD are supporting pulse surveys and staff wellbeing.
- All communications, including meeting invites, outcome letters, OH referral dates, and potential triggers, are documented in a central spreadsheet, updated weekly and shared with HR colleagues.
- It has been noted that the recent return of a senior nurse to the area has positively impacted staffing levels and reduced pressure on the team. With senior leadership focussing on providing nurse assurances around governance, finance, risk, escalation process and policy implementation.

Actions & Next Steps To Be Taken By Service Group

- Manage new emerging pressures to ensure spend does not breach the underlying assessment.
- Support Community services review being carried out by Deputy Director of Nursing
- Support CHC programme board to move towards improved contracting management of LTC placements
- Develop and deliver its cost improvement plans to meet the full £13m target recurrently and utilise non recurrent means to bridge the gap.
- Understand the impact of changing demand profiles ensure no adverse impact on the financial position.

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Appendices

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Savings Schemes in place

Level 4 Area	CIP Number	Scheme Name (100 character Limit)	Scheme Lead / Owner	Recurrent / Non Recurrent	Planned Delivery This Year £'000	Planned Delivery Next Year £'0002	Forecast Delivery This Year £'000	Actual Financial Start Date	Date Scheme Expected to go Green	Scheme RAG rating
Director of Nursing	PCT-6	CHC Immediate Actions	Sian Passey	NR	1,414.00		1,414.00	31/07/2025	31/07/2025	Green
Director of Nursing	PCT-8	LAC Baseline Review	Sian Passey	R	500.00	500.00	500.00	30/08/2025	30/08/2025	Green
Director of Nursing	PCT-20	LAC Resolved Disputes	Sian Passey	NR	191.93		191.93	31/05/2025	31/05/2025	Green
Director of Nursing	PCT-21	LAC Resolved Disputes	Sian Passey	NR	464.00		1,314.00	31/07/2025	31/07/2025	Green
Director of Nursing	PCT-24	Procurement - continence contract	Sian Passey	R	36.00	43.00	36.00	31/07/2025	31/07/2025	Green
Director of Nursing	PCT-27	CHC Baseline Review	Sian Passey	R	500.00	500.00	500.00	31/08/2025	31/08/2025	Green
Director of Operations	PCT-1	GP OOH review including UPCC	Emily Warren	R	50.00	50.00	50.00	30/05/2025	30/05/2025	Green
Director of Primary Care Services	PCT-11	Primary Care Estates Utilisation	Sharon Miller	R	30.00	30.00	30.00	31/05/2025	31/05/2025	Green
Director of Primary Care Services	PCT-19	Release PA vacancy Band 4	Sharon Miller	R	33.00	33.00	33.00	30/05/2025	20/05/2025	Green
Director of Primary Care Services	PCT-26	Primary Care Forensic Review	Sharon Miller	NR	115.00	-	115.00	11/08/2025	11/08/2025	Green
Director of Primary Care Services	PCT-28	Primary Care Balance Sheet	Sharon Miller	NR	896.00		896.00	31/08/2025	31/08/2025	Green
Director of Therapies & Health Sciences	PCT-9	Review Therapies	Helen Annandale	R	43.80	43.80	43.80	31/07/2025	31/07/2025	Green
Director of Therapies & Health Sciences	PCT-23	Review Therapies	Helen Annandale	NR	157.00		157.00	31/07/2025	31/07/2025	Green
Group Management/Other	PCT-25	Forensic Review	Craige Wilson	NR	67.00		67.00	31/07/2025	31/07/2025	Green
Group Management/Other	PCT-29	PCT Balance Sheet	Craige Wilson	NR	137.00		137.00	31/08/2025	31/08/2025	Green
Medical Director	PCT-22	PCT Medical Director Forensic review	Ceri Todd	R	21.70	21.70	21.70	31/07/2025	31/07/2025	Green
					4,656	1,222	5,506			

Savings Schemes in pipeline

Level 4 Area	CIP Number	Scheme Name (100 character Limit)	Scheme Lead / Owner	Recurrent / Non Recurrent	Planned Delivery This Year £'000	Planned Delivery Next Year £'0002	Forecast Delivery This Year £'000	Actual Financial Start Date	Date Scheme Expected to go Green	Scheme RAG rating
Director of Nursing	PCT-7	CHC Medium Terms Actions Pool Arrangements. FY2627	Sian Passey	R	-		-			Pipeline
Director of Nursing	PCT-18	Community Services Review -	Sian Passey		-		-			Pipeline
Director of Primary Care Services	PCT-16	Scope transfer of Orthodontics to PCT SG - shift left. FY2627	Karl Bishop		-		-			Pipeline
Director of Primary Care Services	PCT-17	Shift Left from Sec Care e.g. Carpel Tunne	Sharon Miller		-		-			Pipeline
Director of Therapies & Health Sciences	PCT-10	Back Office review	Helen Annandale	R	167.00		-	30/09/2025	30/09/2025	Pipeline
Director of Therapies & Health Sciences	PCT-15	Income Generation (private therapies; income associate with private patients; independent hospital pathways)	Helen Annandale		-		-			Pipeline
Group Management/Other	PCT-14	Further Forsensic Review of Cost Centres	Craige Wilson		-		-			Pipeline
					167	-	-			