

Overview of Annual Planning

The NCA Executive Management Committee has oversight of business planning. Annual planning is part of business planning because it describes what the organisation is planning to and need to achieve in the financial year. The plan clearly shows how the NCA will achieve the statutory targets as part of the NHS Constitution as well as our own identified objectives and priorities to organisationally improve and transform our services.

The way that we undertake annual planning, and to do it well, is by working alongside our clinical teams so that they are involved in the planning of their services and understand the objectives.

The strategic priorities and objectives identify what we need to deliver for the financial year to realise the NCA's Vision 10, which is the organisation's statement of direction for the next 10 Years, and includes community and place based work with partners. The strategic objectives are set by the NCA board and executives, as well as chief officers of the Care Organisations (COs) with input from corporate, divisions and teams. This is a top down and bottom up approach, with discussions taking place on the ground around future development and changes that may need to happen, which are fed up to feed into the future strategic priorities. This is to ensure that they are the right priorities – reflecting what COs, divisions and teams plan to do over the 12 months, and sometimes into future years, how we will deliver and what the impact will be on workforce, activity, finance and any capital needed. They are then communicated from the Executive and Board into the organisation, divisions and teams on the ground.

Once the plans are agreed and signed off, COs interpret them into more detail in the form of CO objectives which also reflect local activities and priorities. They are then disseminated and feed into the divisions, teams and individual objectives. Each goal within the plan must be clearly aligned to the level above/below it to ensure that the '**golden thread**' is evident right the way through the plan.

The NCA's objectives are reviewed annually in line with the financial period (April-March) and are available at [NCA Objectives 2021-2022 :: Northern Care Alliance](#).

Planning Principles

- The Plan should clearly describe how we will achieve our vision.
- The Plan should be integrated into each ward, team, department and boards and everyone should know how they contribute to achieving it.
- The Plan should be a living document, which is updated as progress is made and as changes happen ('Annual' planning is 'Business' planning).
- It should be clear how and when we achieve our plan.

Manager and Leader Responsibilities

Managers and leaders need to:

- Understand the Strategic Framework/Vision 10 of the NCA and their relevant Care Organisation/Division/Department Objectives and share and discuss them with their teams.
- Understand their service/team activity, capacity and demand, the intentions of the commissioners and be aware of what is happening in your local community to be able to deliver a plan.
- Engage with colleagues early in the process to bring a truly cohesive and coordinated approach, e.g. engaging with clinical teams, working alongside them so that they are involved in the planning of their services and understand the objectives. Also engage with colleagues to ensure a triangulated approach across activity, finance and workforce.
- Understand their contribution to the achievement of individual objectives and Strategic Priorities.
- Develop Team and individual goals that directly support and contribute to the next level objectives, creating a **`golden thread`**, ensuring everyone understands how they are contributing to delivering the NCA's Strategic Priorities.
- Make objectives realistic but challenging and SMART. Be clear on deliverables, measures and targets - it should be clear what they are trying to achieve, where progress is being made, risks, issues, barriers, mitigations and actions that need to be taken to achieve them and where they are being discussed and escalated.

Remember, the NCA cannot deliver the strategic objectives and priorities if team and individual goals are not identified that directly support and contribute to them, creating a **`golden thread`**.

Available Support/Training

The NCA's Training Academy's 'Leadership by All' includes modules which can support leaders with the annual planning process:

- Waiting list management and use of power BI
- Consultant contracts and job planning
- Capacity and demand
- Finance for non-financial managers

A number of other modules/masterclasses are delivered throughout the year.

[Further information is available.](#)

Delivery Team, Planning and Performance, NCA Corporate

The team comprises of experts in performance and planning. This is a small team within the Northern Care Alliance (NCA) Foundation Trust based at Group Headquarters, 3rd floor, Room 2, Mayo Building, Salford Royal (but currently mainly working from home).

Key Contacts

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