



## CUSTOMER SUCCESS STORY



The Tavistock and Portman **NHS**  
NHS Foundation Trust

# The Tavistock and Portman NHS Foundation Trust Maximizes Resources and Value with CA Project & Portfolio Management

## CLIENT PROFILE

Industry: Healthcare

Organisation: The Tavistock and Portman NHS Foundation Trust

Employees: 850

### BUSINESS

The Tavistock and Portman NHS Foundation Trust is a specialist mental health trust based in London. It provides patient services to children, families, adolescents and adults, as well as clinical training and workforce development.

### CHALLENGE

Faced with financial constraints, efficiency targets and growing demand for its services, the Trust must ensure it focuses on business and IT projects that deliver the most benefit.

### SOLUTION

The Trust selected CA Project & Portfolio Management to enable a centralized approach to PPM and support its transformation roadmap. The solution will bring greater transparency and efficiency to a range of change projects.

### BENEFIT

The Trust will be able to prioritize its projects and resources to deliver maximum value to patients and students despite ongoing financial constraints.

## Business

### Improving mental health and wellbeing

The Tavistock and Portman NHS Foundation Trust is a specialist mental health trust based in London, UK. For almost 100 years, its Tavistock and Portman clinics have embraced a distinctive way of thinking about and understanding mental distress, mental health and emotional wellbeing.

Whilst child and adolescent mental health comprise the majority of the Trust's patient services, it also offers a range of specialist and generic applied psychological therapy services to adults, including forensic services.

Education and training services are another significant area of activity for the Trust; it enrolls more than 2,000 students each year and has strong university partnerships.

The Trust also seeks to develop and share its thinking and practice through research, organisational consulting and influencing public debate. It has developed a national and international reputation based on excellence in service delivery and clinical innovation.

## Challenge

### Prioritizing projects and resources

"Financial constraints across the NHS mean we must focus efforts and resources where they will generate most benefit."

#### David Wyndham Lewis

Director of Transformation and Technology, The Tavistock and Portman NHS Foundation Trust

Operating within the National Health Service (NHS), the Trust must deliver its services against a backdrop of financial pressures and annual efficiency targets. At the same time, it is experiencing substantial growth in the numbers of patients and students.

Digital transformation will be vital to helping the Trust continue its tradition of clinical excellence and innovation as well as high-quality training. As David Wyndham Lewis, Director of Transformation and Technology at the Tavistock and Portman NHS Foundation Trust, explains, "We began our digital transformation by deploying new technology alongside existing platforms to improve internal efficiency. Now we need to progress to greater levels of maturity, such as changing our clinical and education practices and creating new services, with technology as an enabler."

Traditionally, change projects were commissioned by individual business units. This resulted in a proliferation of projects and a lack of visibility as to which would deliver most value to patients and students, and ultimately the Trust. This approach also hampered reporting and governance, which are key within the public sector.

The Trust needed a change of approach to project and portfolio management (PPM). "Financial constraints across the NHS mean we must focus efforts and resources where they will generate most benefit," comments Wyndham Lewis. "We needed to centralize our PPM activities and gain better visibility of individual projects. To do this with our current methods would have entailed working with multiple spreadsheets, paper forms and liaising with numerous disparate teams."

## Solution

### Centralised and consistent approach to PPM

"We can map costs and resources more accurately, and ensure that financial management is in line with tolerances agreed by the Trust's board."

#### David Wyndham Lewis

Director of Transformation and Technology, The Tavistock and Portman NHS Foundation Trust

After a competitive tender, the Trust partnered with CA Technologies to help transform its PPM approach. "CA Technologies demonstrated the breadth and depth of experience we needed to make our transformation a success," says Wyndham Lewis. "It worked with us to map our specific requirements and provided a tailored solution to meet those needs."

The Trust's infrastructure is increasingly a combination of public and private cloud environments, so it was important that the new PPM solution could be externally hosted.

CA Technologies partner Pemari Consulting assisted with the deployment of CA Project & Portfolio Management. By customizing the CA Technologies solution to map to existing financial instructions and public procurement regulations, the partner created an NHS pack that other organisations within the group can leverage for their own implementations.

Using best practice processes, the company also delivered value with the speed of deployment, as Wyndham Lewis comments, "Pemari's PPM and industry expertise allowed us to implement the solution in a timeline that we could not have achieved internally."

As well as establishing a central project management office (PMO), the Trust has developed a new change management governance model, which is supported by CA Project & Portfolio Management.

The solution's granular reporting, waterline views and intelligent dashboards allow the Trust's management to select the most appropriate projects to progress when faced with new constraints.

"CA Project & Portfolio Management sheds light on exactly what is happening within a project and ensures that decisions and issues are addressed effectively," explains Wyndham Lewis. "A central solution also enables us to collaborate with far greater efficiency and ensure that we are allocating the right resources to the right tasks."

### Greater transparency and governance

With the Trust facing ongoing budget pressures, robust financial management of its projects is key. "In the past, it has been challenging to plan future change programmes due to the potential uncertainty around financial availability," comments Wyndham Lewis. "With central visibility of the project pipeline, we can map costs and resources more accurately, and ensure that financial management is in line with tolerances agreed by the Trust's board."

The Trust will eventually use CA Project & Portfolio Management to co-ordinate the delivery of all projects, such as estates and facilities, HR, and a relocation programme planned for 2020.

"Projects are increasingly about business and process transformation and less about the technology," explains Wyndham Lewis. "For example, our remote patient care initiative requires change to our clinical pathway and how we can best provide that service to patients using technology as an enabler."

## Benefit

### Delivering better outcomes

"CA Project & Portfolio Management will help us prioritize and deliver those projects that directly improve outcomes for our patients and students."

#### David Wyndham Lewis

Director of Transformation and Technology, The Tavistock and Portman NHS Foundation Trust

The Tavistock and Portman NHS Foundation Trust now has the consistent and robust foundations it needs to ensure its transformation initiatives deliver maximum value.

"As our digital transformation evolves, we will need to track an array of smaller projects, each of which will have complex dependencies," says Wyndham Lewis. "CA Project & Portfolio Management will play a vital role in ensuring that all digital transformation projects are delivered efficiently and in line with the Trust's overall objectives."

With a centralised approach to PPM, the Tavistock and Portman NHS Foundation Trust will be able to:

- Manage resources and budgets more effectively
- Accelerate project delivery
- Achieve consistent governance and reporting.

All of these factors will help the Trust drive maximum value and achieve its business objectives. "CA Project & Portfolio Management will help us prioritize and deliver those projects that directly improve outcomes for our patients and students," concludes Wyndham Lewis.



Since 2007, Pemari has been focused on helping organisations drive business transformation and operational excellence through the power of CA Project & Portfolio Management (CA PPM). Leveraging a combination of best practices, a proven implementation approach and industry leading CA PPM experts, Pemari are able to deliver innovative solutions that exceed expectations and deliver real business value. Find out how Pemari can help you at: [www.pemari.com](http://www.pemari.com)

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