

CSH Surrey

New partnership transforms financial management and frees up significant resource



“One of the biggest benefits of partnering with NHS SBS is having financial control at your fingertips and the ability to affect organisation-wide change in the moment.”

*Charlotte Vitty, Chief Financial Officer
CSH Surrey*

CSH Surrey – formerly known as Central Surrey Health – provides NHS community nursing and therapy services for children across Surrey and adults in mid and north west Surrey. Operating across 80 sites, all with different working practices and cultures, the organisation was keen to standardise its financial systems and move away from outdated, paper-based processes and reporting. For the new Chief Financial Officer, Charlotte Vitty, migrating to the NHS Shared Business Services (NHS SBS) platform has been an extremely worthwhile journey.

The Challenge

On joining CSH Surrey as the organisation’s new Chief Financial Officer, Charlotte Vitty was quick to recognise opportunities to improve efficiency and business intelligence, whilst identifying a number of processes in need of modernisation.

With no centralised system, the organisation – which provides high-quality care from a range of locations, including schools, GP surgeries and community hospitals, and home-based services like district nursing – managed all of its financial transactions locally. And whilst individual teams had strong treasury controls, they were working with very limited data and business intelligence.

Key Benefits

- Month end financial reporting down from 20 to 7 days
- Modern central finance system replaces inconsistent and inefficient manual processes
- More accurate data, faster processes and more appropriate allocation of work
- Expert migration team ensures “seamless” transition

Charlotte explained: “Manual systems were still being used inconsistently and basic financial reporting was a hugely time-consuming endeavour for the team.

“In addition to outdated processes we had a cultural challenge to overcome. Our workforce is very spread out across the county with varying levels of demand and training requirements.

“I knew there was a huge opportunity for us to review our structures and that the organisation could benefit greatly from updated finance and accounting systems. But, before embarking on any technical solutions, we’d first need to win over hearts and minds.”

“Any migration needed to be approached sensitively and logically. I was only willing to consider switching to an external provider if I could find an organisation that would form a real partnership and solve problems alongside me.”

The Solution

Before embarking on project planning, NHS SBS assembled an expert team to ensure each key contact at CSH Surrey had a direct equivalent. As part of its onboarding process, NHS SBS spent time building relationships with the internal team, organising training to ensure shared milestones and desired outcomes and even arranging field trips. This included taking CSH Surrey employees to the NHS SBS Bristol office to learn how the teams work and experience live processes.

Charlotte said: “I’d discussed with NHS SBS the importance of bringing our finance team ‘on the journey’ with them. They certainly did this and really invested time in building relationships with key members of our team. This is very different to what I’ve experienced in my professional career with other shared service suppliers.

“The project wasn’t always easy and we came up against hurdles, however, because of the strong partnership we had built we were able to have honest conversations as a team to quickly identify solutions.”

CSH Surrey had an ambition to ‘go live’ with its new centralised system on 1 April. So, with a lot of hard work, strong project management on both sides and technical expertise to migrate work streams, this goal was achieved.

Charlotte added: “NHS SBS has continued to invest time after ‘go live’. The implementation team provided four weeks’ of follow up support, which reassured everyone that they weren’t on their own. This is a big USP of working with NHS SBS.”

The Result

Thanks to its partnership with NHS SBS, CSH Surrey has moved from inefficient and inconsistent local systems, to a much-improved central system that provides more accurate data, speeds up processes and enables a more appropriate allocation of work.

According to Charlotte, “Go live was seamless” with board members and colleagues at all levels commenting on how smooth the transition was.

Some benefits were realised immediately, such as month end financial reporting being completed in just seven days instead of the 20 it had taken previously. This is expected to reduce even further.

Charlotte said: “Business units are now ‘self-serving’ their financial reports, freeing up resource in the wider team. That means we are already exceeding some of our ambitious KPIs.

“One of the biggest benefits of partnering with NHS SBS is having financial control at your fingertips and the ability to affect organisation-wide change in the moment.

“We are thoroughly thrilled with the new service we have. NHS SBS doesn’t make recommendations thinking about costs and money; they do so because they want the best for their NHS clients.”

To hear how your NHS organisation could also benefit from partnering with NHS Shared Business Services, contact us at sbs-w.corporatemarketing@nhs.net.