**A Prophix Case Study**

# Betsi Cadwaladr University Health Board



Betsi Cadwaladr University Health Board is the largest health organisation in Wales, providing a full range of primary, community, mental health and acute hospital services for a population of around 678,000 people across the six counties of North Wales (Anglesey, Gwynedd, Conwy, Denbighshire, Flintshire and Wrexham). The Health Board has a budget of £1.3 billion and a workforce of approximately 16,500.

Ian Jones is the head of financial reporting and recently led the selection and implementation of Prophix to help the Board deliver financial planning in a more consistent manner.

## Three Year Planning Cycle

Health Boards work on a three-year planning cycle with the Welsh government and produce regular monitoring returns, following a set of requirements and rules that have been subject to frequent change in the recent past. Until recently, Betsi Cadwaladr's planning and budgeting preparation happened across dozens of different spreadsheets.

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**Ian Jones**
**Head of Financial Reporting**
**Betsi Cadwaladr University**

## Better Budgeting

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Betsi Cadwaladr Health Board selected Prophix's Corporate Performance Management system based on its "flexibility and user-friendliness" - and because it presented itself as a very cost-effective solution.

## Staff Planning

The new system was initially procured to tackle staff planning. Staff budgets are 75-80% of the Board's expenditure. Information is pulled into the system from the NHS Electronic Staff Record and then linked to the general ledger for annual budget balances rolled forwards.

Jones notes here that the biggest implementation challenge was consistency of approach from the different members of the team: "It can be very difficult to get consistency in processes across a large team and this applies to the budget-setting process. The system is very flexible but once it's in place you're enforcing a standard. My advice would be to get your policies straight first." Jones gives the example of how vacancies were previously dealt with in staff planning, with different divisional teams having different approaches.

## Consistency and Automation

With the system in place, the team at Betsi Cadwaladr has gained consistency but also saved an awful lot of time. Further savings in time are expected as the system is further developed.  "The unexpected benefit was the level of automation that is possible: bringing information in from ESR and uploading to the general ledger is automatic. People can very quickly extract their required reports from templates."

## Scenario Modelling

Jones has also seen benefits from the ability to model future scenarios, such as the impact of pay awards. "It's very simple to copy data into a new scenario and start to play about to see what might happen.

You can have dozens of different scenarios with quite sophisticated modelling – we can pin down the impact of pay awards to individuals posts if needs be."

The next step is automating the production of monitoring returns for the Welsh Government and developing more in-depth analysis. "With the increasing requirements and evolving reporting requirements, being able to make the changes once will save a huge amount of time."

## About Prophix

Prophix develops innovative software that automates critical financial processes such as budgeting, planning, consolidation and reporting — improving a company's profit-ability and minimising its risks. Thousands of forward-looking organisations in more than 90 countries use software from Prophix to gain increased visibility and insight into their business performance.