



THE NHS NORTHERN  
FACILITIES MANAGEMENT TRAINING ADVISORY GROUP  
PRESENT THE FM ANNUAL LEARNING & DEVELOPMENT FORUM 2015,  
A TWO-DAY RESIDENTIAL EVENT

# MEASURING FOR SUCCESS

to be held on

THURSDAY AND FRIDAY, 17<sup>TH</sup> AND 18<sup>TH</sup> SEPTEMBER 2015

at

THE CASTLE GREEN HOTEL, KENDAL, CUMBRIA  
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**At every turn we are expected to be able to account for our services and demonstrate their effectiveness, efficiency and quality. It seems to be a never ending demand.**

**How are others meeting this challenge? What techniques, tools and methods are they using? Why have they chosen to do this and what are their drivers? More importantly how are they doing and how do they see their services changing in the future to meet these demands and are there any opportunities available to give us space to breath?**

**The conference will enable delegates to share their knowledge with like-minded colleagues, as well as creating the opportunity to challenge all involved in the delivery of estates and facilities to ensure the services we provide to our patients are aspirational, sustainable and fit for the future.**

**MEASURING FOR SUCCESS will benefit Estates and Facilities Directors and aspiring Directors as well as service planners and people looking at how the future direction may impact on their services and how they may be delivered.**

**The cost of attending the TWO-DAY RESIDENTIAL WORKSHOP IS £295.00 per person**

Residential conference fee includes attendance at the two-day workshop, course information, overnight accommodation at the Castle Green Hotel in en-suite bedroom (single occupancy), full English breakfast, morning coffee/tea, two-course buffet lunch, afternoon coffee/tea, and evening dinner. All delegates are entitled to use the Hotel's leisure facilities including swimming pool, steam room and gymnasium.

**We are also able to offer places for DAY DELEGATES at a rate of £125.00 per person per day (non residential)**

Day delegate rate includes course information, morning coffee/tea, two-course buffet lunch and afternoon coffee/tea.

**THE WORKSHOP IS ALWAYS WELL ATTENDED SO DELEGATES ARE ENCOURAGED TO REGISTER THEIR INTEREST AS EARLY AS POSSIBLE**

**FACILITIES MANAGEMENT  
TRAINING ADVISORY GROUP**

**MEASURING FOR SUCCESS**

**THURSDAY AND FRIDAY,  
17<sup>TH</sup> AND 18<sup>TH</sup> SEPTEMBER 2015  
PROGRAMME**

**DAY ONE – THURSDAY, 17<sup>TH</sup> SEPTEMBER 2015**

9.30 am REGISTRATION  
Coffee/Tea on arrival – Kendal Suite Foyer

**10.00am WELCOME AND INTRODUCTION**

**Presenter – PAUL HOLT**

Divisional Director - Estates, Facilities and Capital,  
Lancashire Teaching Hospitals NHS Trust  
(Member of the FM TAG)

**10.15am THE PROFESSIONALISATION OF LEADERSHIP**

**Presenter – MIKE CHITTY**

Head of Delivery, NHS Leadership Academy

*The NHS has increasing challenges identifying senior leaders able and ready to take on some of the more enduringly complex roles in the NHS. The problem is one of sustained underinvestment in developing skilled leaders at every level in the NHS and the NHS needs to be at least rigorous in developing talent. These leadership roles should carry the same requirements for demonstration of fitness to practice as any other industry. There is an acute need to determine a more structured, robust and informed strategy to address this problem and to avoid ongoing short-term fixes to find the right candidates for key roles. The NHS Leadership Academy will discuss how they are supporting the current leadership development challenges and why leadership needs to improve to support the NHS.*

11.00am Morning Coffee/Tea – Kendal Suite Foyer

**11.30am CAPTURING THE EVIDENCE NECESSARY FOR  
ASSURING COMPLIANCE**

**Presenters – RUSSELL JAMES & RICHARD CONVEY**

Trust Resilience Managers, Stockport NHS  
Foundation Trust

*Russell and Richard to give an overview of how things have been at Stockport over the past 12 months in particular the issues around turnaround.*

**12.15pm MERGERS AND ACQUISITIONS**

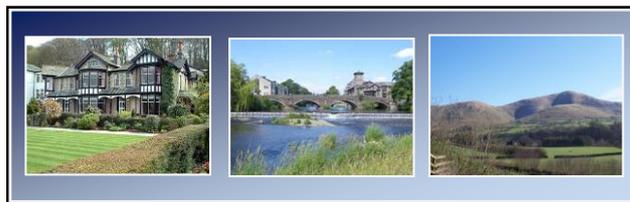
**Presenter – JOHN SIMPSON**

Director of Corporate Services, University Hospitals  
of North Midlands NHS Trust

**Presenter - MARK FISHER**

Transitional Manager, University Hospitals of  
North Midlands NHS Trust

*John to present a session on the merger of the Staffordshire Trusts -  
University Hospital of North Staffordshire & Stafford Hospital*



13.00pm Buffet Lunch served in the Kendal Suite Foyer

*(time to register with Hotel at Main Hotel  
reception)*

**14.00pm “DO LOGISTICS MATTER TO PATIENTS”**

**Presenter – SIR IAN McCARTNEY**  
Chair, Healthwatch Wigan

*Sir Ian McCartney will provide his perspective of where Healthwatch see themselves with assurance and provide delegates with the Patient's perspective.*

**14.45pm THE LOW SIZERGH FARM STORY**

**Presenter – JOHN PARK**

Business Owner of Low Sizergh Barn, Low Sizergh  
Farm, Kendal, Cumbria

*Local business Low Sizergh Barn, A South Cumbria business that has evolved from its routes as a busy working dairy farm, to a thriving business providing a broad range of activities to ensure ongoing repeat business by the visiting public, from nature trails through ancient woodland to a tea room, farm shop voted in the top 10 in the UK by a national newspaper and a health promoting horticultural business called Growing Well. The farm and business owner John Park will present the evolution of this popular destination.*

15.30pm Afternoon Coffee/Tea – Kendal Suite Foyer

**15.45pm STRATEGIC SPACE MANAGEMENT**

**Presenter – IAN McMANUS**

Director of Estates, Manchester Metropolitan  
University

*Ian and colleague to cover topics such as: estates strategy, sweating assets, master planning, governance, 10 year strategy for estates, Guerilla Architecture: using space better*

**16.30pm SUMMARY OF DAY ONE**

**Presenter – PAUL HOLT**

Divisional Director - Estates, Facilities and  
Capital, Lancashire Teaching Hospitals NHS Trust  
(Member of the FM TAG)

19.30pm Pre-Dinner Reception served in the Kendal Suite

20.00pm Evening Dinner served in the Kendal Suite

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**DAY TWO – FRIDAY, 18<sup>TH</sup> SEPTEMBER 2015**

7.00 am From 7.00 am onwards – Full English  
Breakfast served in the Greenhouse Restaurant

9.30 am **LEADING AN AWARD WINNING ORGANISATION  
AND THE JOURNEY SO FAR**

**Presenter – ANDREW FOSTER**

Chief Executive, Wrightington, Wigan and Leigh  
NHS Foundation Trust

*Andrew to talk about journey that lead to Wrightington Wigan and Leigh  
NHS FT the HSJ Awards 2014: 'Provider Trust of the Year'*

10.30 am Morning Coffee/Tea – Kendal Suite Foyer

11.00 am **PAM, ERIC AND YOU!**

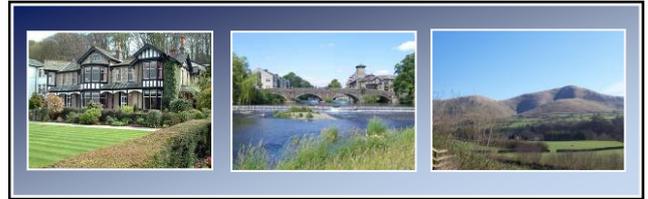
**Presenter – ALISON McCREE**

Associate Director of Facilities, County Durham  
and Darlington NHS Foundation Trust

**Presenter – DAVID EVANS**

Associate Director of Estates and Facilities  
Wrightington, Wigan and Leigh NHS Foundation  
Trust

*David and Alison will share with delegates how they demonstrate  
compliance and provide performance measurement data at their  
respective Trusts.*



12.50 pm **SUMMARY & CLOSING REMARKS**

**Presenter – PAUL HOLT**

Divisional Director - Estates, Facilities and  
Capital, Lancashire Teaching Hospitals NHS Trust  
(Member of the FM TAG)

13.00 pm Buffet Lunch served in the Greenhouse  
Restaurant

**SAFE JOURNEY HOME**

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**PAUL HOLT****Director of Estates, Stockport NHS Foundation Trust**

Paul has worked in the NHS for over 25 years. As a Chartered Builder, Paul graduated from the Lancaster Executive MBA Programme in 2008. Until May 2015 Paul was the Director of Estates and Facilities at Stockport Hospital Foundation Trust. His focus is to ensure all areas of his responsibility concentrate on the well-being of the Patient through timely interventions and progressive planning. Added to this is the successful delivery of significant cost reduction programmes, whilst successfully ensuring a safe and compliant hospital environment. Several major construction schemes are accredited to Paul and his previous team – the most recent project being the opening of a brand new £ 3m kitchen, providing plated meals to our inpatients and wide range of appetising choices to our visitors.

A keen advocate of P21+, Paul has led an exemplar project at Stockport, involving a wide range of User and Focus groups including Disability Stockport and Health Watch. The result is the commencement of the next part of the site rationalisation strategy, constructing an £ 18m, 150 beds, 3 storey ward/twin theatre development to be open in May 2016. More latterly Paul has been appointed as the Divisional Director of Estates and Facilities at Lancashire Teaching Hospital Foundation Trust. His new role is very similar to previous experiences, to be delivered in a larger more complex environment

Paul has been actively involved in the North West Training Advisory Group for several years. He recognises the benefits of NHS Estates and Facilities Professionals developing training programmes specifically designed to cover the needs of all their staff irrespective of the level they operate at. More recently Paul has been elected the Chair of the North West HEFMA Group.

**MIKE CHITTY****Head of Delivery, NHS Leadership Academy**

Mike has spent 30 years in learner centered training and development. Helping to make strategy and leadership work in complex systems both public, third and private sector. Developing more entrepreneurial approaches to work.

**RUSSELL JAMES JP, LLB, MA, BSc, MSc, MIFireE****Trust Resilience Manager, Stockport NHS Foundation Trust**

After leaving the British Army, Russ joined Greater Manchester County Fire Service in 1979 where he progressed through the ranks in both operational and fire safety roles. Between 1996-99, he was seconded to the Fire Service College as the Divisional Commander for national fire safety training. The next seven years were spent working as Head of People Development before becoming Area Commander for fire safety in 2006. During all of that time Russ held strategic incident command responsibility and took charge of many major incidents. On retiring from the Fire and Rescue Service in 2010 Russ commenced his current position as the Emergency Preparedness, Fire Risk and Safety Manager for Stockport NHS FT. Russ is married with two adult sons and is passionate about sport, particularly rugby. In his very limited spare time, he is also a Magistrate for the City of Manchester.

**RICHARD CONVEY****Trust Resilience Manager, Stockport NHS Foundation Trust**

Richard joined the NHS in 1998 as an Emergency Ambulance Technician for Greater Manchester Ambulance Service. After leaving the service in 2002 he became a Countryside Ranger for BTCV and Rochdale MBC. During this time he developed land management plans and systems to ensure woodlands in Rochdale locality obtained Forest Stewardship Council (FSC) accreditation via the UK Woodland Assurance Standard (UKWAS).

In 2008 Richard returned to the NHS as an Emergency Planning Officer for Tameside & Glossop PCT, transferring in 2011 to Stockport NHS FT as their Resilience Manager. Current role includes ensuring the Trust complies with the Civil Contingencies Act 2004 and NHS England EPRR Core Standards. Responsibilities include design and development of quality management systems to enable the Trust to obtain and maintain accreditation against ISO 22301: 2012 (Business Continuity) and within the Estates Department OHSAS 18001: 2007 (Occupational Health & Safety).

## **JOHN SIMPSON**

### **Director of Corporate Services, University Hospitals of North Midlands NHS Trust**

John is a Chartered Engineer and currently Director of Corporate services at the newly formed University Hospitals of North Midlands. His position included responsibility for over 16 non clinical services including all aspects of Estates and Facilities management, Capital planning and investment, Supplies & Procurement and PFI contract management in one of the largest acute teaching NHS Trusts in England.

He is presently leading on the integration of the former Mid Staffordshire Trust E&FM functions into the newly formed organisation, as well as delivering the £100m capital investment required to deliver the new clinical model.

He has over 25 years' experience of managing a whole range of corporate services in both the public and private sector, prior to joining UHNM John was Director of E&FM at Nottingham University Hospitals NHS Trust. John was also DoE&FM at Sheffield teaching Hospitals for 10 years. John has now led on the successful merger of the E&FM functions of three of the country's largest University teaching Hospitals. John is a member of the DH E&FM efficiency group helping to share best practice across the NHS. He also has experience of the private sector having trained and worked in the heavy engineering & manufacturing industry at GEC. John has also worked in the financial services sector at Barclays Bank where he was responsible for the continuous availability of the banks critical infrastructure.

## **MARK FISHER**

### **Transitional Manager, University Hospitals of North Midlands NHS Trust**

Mark joined the NHS as a Student Nurse in 1988 – qualifying and practicing at Blackpool Victoria Hospital, working as a Registered General Nurse across a number of clinical specialities.

In 1994, Mark was the first RGN from Blackpool to be selected to complete the 2 year NHS General Management Scheme, completing an MA in 'Managing Healthcare Organisations', at the Manchester Centre for Healthcare Management at Manchester University. On completion of the GMTS, Mark took up post at the Lancaster Acute Hospital as the Directorate Manager for the newly formed Facilities Directorate and worked at the University Hospitals of Morecambe Bay NHS Trust in various Estates and Facilities roles until 2008. During this time, Mark also took up a couple of secondment opportunities working at Lancashire Teaching Hospitals NHS Trust, initially fulfilling the role of General Manager of Mental Health and Learning Disabilities, prior to taking up a further twelve month secondment as Directorate Manager for Anaesthetics and Theatres.

In 2009, Mark was appointed to the role of Associate Director of Estates and Facilities at the Central Manchester and Central Manchester Childrens Hospitals

NHS Foundation Trust – working on the completion, commissioning and transfer of services to the new PFI Hospital build project and centralisation of healthcare services onto the Central site.

Since 2012, Mark has been working as an Interim Manager – and has completed assignments as Associate Director of Estates and Facilities at Peterborough and Stamford NHS Foundation Trust, prior to joining the University Hospital of North Midlands in 2012 - working on a number of operational and project based workstreams - most recently heading-up the Estate and Facilities project team in the detailed separation, acquisition and integration project with Mid Staffordshire NHS Foundation Trust.

## **SIR IAN McCARTNEY**

### **Chair, Healthwatch, Wigan**

Sir Ian McCartney is Chair of Healthwatch Wigan. He has 23 years of experience as an MP, serving as MP for Makerfield between 1987 and 2010 and holding a number of ministerial positions.

Born in 1951, Sir Ian had a number of jobs after leaving school, including working as a seaman and a local Government manual worker. He was a councillor for Wigan Borough from 1982-87.

In Parliament he held various ministerial roles, including Minister of State for Trade, Investment and Foreign Affairs (2006-2007); Minister Without Portfolio and Party Chair (2003-2006); Minister of State for Pensions at the Department for Work and Pensions (2001-2003); Minister of State for the Cabinet Office (1999-2001); and Minister of State at the Department of Trade and Industry (DTI) (1997-1999).

Prior to that, Sir Ian held a number of positions in opposition, including as spokesperson on health, employment, education and social services.

At the Cabinet Office, Sir Ian was responsible for modernising Government and E-Government. He was also responsible for the co-ordination of the 2002 Commonwealth Games, drugs policy and the Better Government for Older People initiative. This was launched in June 1998 to improve public services for older people by listening to their needs on wide ranging issues including, access to benefits, health, housing and transport.

At the DTI, he succeeded in steering through legislation creating a national minimum wage, the fairness at work legislation and the Competition Act. As a Minister he also designed and introduced Pension Credit helping 2 million pensioners in poverty. Subsequently he was voted Backbench MP of the year in 2008 and 2009.

Sir Ian McCartney is married with one son (Hugh, who died tragically in 1999), two daughters, ten grandchildren and two great grandchildren. He is a keen supporter of Wigan Rugby League.

### **JOHN PARK**

#### **Business Owner of Low Sizergh Barn, Low Sizergh Farm, Kendal, Cumbria**

John's dairy farming career began on a small dairy farm in 1964 at his first tenancy in north Lancashire. Moving to Low Sizergh in 1980. The catalyst for diversification was the introduction of milk quotas in 1984. A planned herd expansion on a newly tenanted farm was no longer possible and it was necessary to look for alternatives to income from the wholesale milk market. A pick your own strawberries enterprise indicated the potential for more permanent retailing. Marjorie and John converted a redundant late 17<sup>th</sup> century Westmorland stone barn on the farm, opening Low Sizergh Barn in 1991 followed by a tea room a year later.

Son Richard has been in partnership on the farm since 1986 and daughter Alison joined the retail business in 1996. In 2003 Growing Well began setting up their social enterprise on the site.

John is involved in many rural & agricultural committees and organisations, including being a Fellow of the Royal Agricultural Society of England and a community speaker for groups such as the WI, Townswomen's Guild, Rotary, Probus & church groups.

John's hobbies include current affairs & politics, old Ferguson tractors and food.

### **IAN McMANUS**

#### **Director of Estates, Manchester Metropolitan University**

Ian is a Chartered Engineer with over 25 years' experience of "Engineering Business Management " across a broad range of disciplines including Estates & Facilities Design and Management, Project Management, Product Design, New Product Introduction, Engineering and Manufacturing Operations.

He has worked across a number of industry sectors including Advanced Manufacturing, Higher Education, Commercial Developments and Healthcare Estates and Facilities in the NHS.

Ian is currently Director of Estates at Manchester Metropolitan University. The role covers the strategic and operational management of the University Estate across all phases of the lifecycle from Master-planning through to disposal. Responsibilities include Capital Projects, Property Services, Environmental Strategy, Security and Business Continuity. He also attends and advises corporate committees such as Health & Safety, Strategic Space Management, Estates Services Advisory Group and sits on the Executive of Corridor Manchester.

Ian is passionate about information and work flow and retains a strong interest in Lean Principles and how it can be translated into any sector in order to maximise value and minimise waste.

Previously held positions include :

Assistant Director of Clinical Support and Facilities Management - Blackpool Teaching Hospitals NHS Foundation Trust

Product Development/ Project Director - UPP Ltd

Programme Director – Lancaster University

Director of Design and Development – Ultraframe UK

Senior Lean Consultant – Simpler Consulting Europe

Lean Deployment Team Leader – BAESYSTEMS

### **ANDREW FOSTER**

#### **Chief Executive, Wrightington, Wigan and Leigh NHS Foundation Trust**

Andrew became Chief Executive of Wrightington, Wigan and Leigh NHS Trust in January 2007 following a short secondment as a Trust HR Director in Blackpool. From 2001 to 2006 he was Director General of Workforce at the Department of Health with the dubious pleasure of responsibility for pay modernisation, workforce planning and employment policy. Before that he was the Chairman of Wrightington, Wigan and Leigh NHS Trust from 1996 to 2001. Andrew is married with three fairly grown up children and lives just outside Wigan.

### **ALISON McCREE**

**Alison McCree MBA, is Associate Director of Facilities at County Durham and Darlington NHS Foundation Trust**

Alison has worked in NHS Facilities Management for 31 years, 25 of those years has been spent working in Senior Management roles and the past 12 as Associate Director. Alison is from County Durham and has worked in a number of Acute hospital sites across County Durham and Darlington during her working life.

Alison's career started as a NHS national trainee in 1984, over the years she has held a number of positions and managed a wide range of services that fall under the umbrella of Estates and Facilities including the management of in-house services and PFI Contracts providing Hard and Soft FM services.

Her day-to-day responsibilities include the leadership of 500 staff, delivering Facilities Services across eight hospital sites and a large number of Health Centre Premises. Alison is also responsible for the management of 3 separate PFI contracts that provide Estates and Facilities services. Alison believes Estates and Facilities staff are in a privileged position in that that it is often the little things that our services can offer which make the biggest differences to patients.

Alison is passionate about delivering the highest quality Facilities services to patients and service users and over the years has been involved in a number of national strategic projects to improve the patient's journey and experience within the NHS and more recently was a member of Project Group that developed the specification for cleanliness in healthcare premises (PAS 5748) and is currently a member of the DH NHS PAM 2015 Working Group.

### **DAVID EVANS, MCIQB**

**Associate Director of Estates and Facilities at Wrightington, Wigan and Leigh NHS Foundation Trust**

David is a Chartered Builder by profession and has spent all of his working life designing and managing healthcare construction projects within the NHS.

David started his career in the NHS in 1977 as a Trainee Architectural Technician with the Mersey Regional Health Authority, where he continued his formal technical training whilst developing a passion for healthcare design. He moved to Wigan Health Authority in 1980 as a Building Officer, working on a wide range of healthcare refurbishment projects.

David has continued with his technical and professional development and has risen through the Estates and Facilities ranks holding a number of positions, these have included; Senior Building Officer, Assistant District Estate Manager, Head of Capital Development, Assistant Head of Estates and Facilities and most recently in 2008 becoming Associate Director of Estates and Facilities.

David's current role gives him responsibility for all aspects of the Trusts Estate and Facilities services which includes capital developments, maintenance and statutory compliance, medical equipment management, grounds and gardens, domestics, portering, catering, linen services, switchboard, transport, security, fire safety, and energy and sustainability. Under his leadership the E&F Division has seen a significant improvement in its performance across all areas and demonstrable improvements in the quality of our patient environment whilst developing a keen business approach which has seen successful income generation initiatives most particularly in the catering team.

David has Chartered Membership of the Institute of Building and has studied to Post Graduate level in Facilities Management.