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University Health Board



# Investment and Benefits Realisation Report Appendix

## Finance and Performance Committee

24 February 2026

# 2025/26 Investment Case Update (1 of 3)

## Key Commentary

Priority cases within the 2025/26 Annual Plan for which investment funding was supported, have been progressing through an internal review and scrutiny process during Q1.

- All cases considered through the initial review process
- To date 14 cases have been approved through Formal Executive Team
- 1 case has been updated and resubmitted for the scrutiny process to continue and will be considered as part of the 2026/27 planning cycle

The status update of each proposal in respect of the investment scrutiny process is outlined below and across the following 2 slides.

Annual Plan Category	CCG / Directorate	Description	Annual Plan Provision £	Approved 25/26 £	Approved Recurrent £	Status	Formal Executive Team consideration
Local Future Investments	Planned and Specialist Care	Acute Oncology Service (AOS) provision improvement	398,013	174,407	398,013	Approved	16/04/2025
Local Future Investments	Planned and Specialist Care	Ophthalmology IVT recovery plan - clinic staffing capacity	350,000	350,000	350,000	Approved	16/04/2025
Local Future Investments	Planned and Specialist Care	Ophthalmology IVT recovery plan - drug consumption	1,300,000	1,300,000	1,300,000	Approved	16/04/2025
Local Future Investments	Planned and Specialist Care	Endoscopy	700,000	439,796	475,719	Approved	16/04/2025
Local Future Investments	Allied Health and Health Scientists	Radiology diagnostic improvement	1,500,000	1,500,000	1,500,000	Recommendation made to Execs. Subsequent follow up to finalise approval. <b>Approved</b>	16/04/2025
Local Future Investments	Digital	Modular Electronic Health Record	1,800,000	1,540,000	1,800,000	Recommendation made to Execs. Subsequent follow up to finalise approval. <b>Approved</b>	16/04/2025
Local Pre-Commitment	Estates and Facilities	Additional fire wardens required at WGH	178,000	153,922	178,000	Approved	21/05/2025
Local Pre-Commitment	Director of Nursing	Legal Service	324,945	269,842	324,945	Approved	21/05/2025

## 2025/26 Investment Case Update (2 of 3)

Annual Plan Category	CCG / Directorate	Description	Annual Plan Provision £	Approved 25/26 £	Approved Recurrent £	Status	Formal Executive Team consideration
Local Pre-Commitment	Estates and Facilities	Maintenance Volume	400,000	0	0	Deferred, awaiting paper. Exec decision to release funding reserve, recognising new leadership arrangements for CCG and need for wider review of function to inform an investment plan. Any subsequent proposal will feed in through planning cycle. <b>Funding reserve released as a recurrent saving scheme.</b>	N/A
Local Pre-Commitment	Director of Workforce	International Recruitment (Medical)	200,000	0	0	Deferred, awaiting paper. Subsequent confirmation of WG funding to support recruitment. <b>No investment required, funding reserve released as a recurrent saving scheme.</b>	N/A
Local Pre-Commitment	Medical Director	VBHC - Heart Failure	624,000	0	0	Exec recommendation made. Exec ask to service that savings assessment re-visited, reassess and determine future, VBHC funding extended. Review of options in respect of service mitigation plans and recurrent cost requirement being assessed through Value & Sustainability Group, timeline set for end of October. <b>Financial reserve converted to a non-recurrent saving scheme for 25/26.</b>	21/05/2025
Local Pre-Commitment	Estates and Facilities	RAAC revenue pressure	150,000	150,000	150,000	<b>Approved</b>	04/06/2025
Local Future Investments	Director of Public Health	Child Obesity PH	300,000	80,000	0	Progressed through batch 2, required greater clarity ahead of making recommendation, plus affordability challenge given budget available. Exec decision to pause potential investment until latter stages of 25/26, non-recurrent saving to be transacted month on month in the interim. Non-recurrent funding allocated to support dietician capacity for selective eating disorders £80k. Plan to be considered as part of 26/27 planning priorities.	TBC
Local Future Investments	Central Reserves	Nurse Staffing 25b Provisional Autumn 2024 Review	380,030	164,551	164,551	Progressed directly through Executive Team, Spring Review 25b. <b>Approved</b>	N/A
Local Future Investments	Central Reserves	Nurse Staffing 25a Provisional MH&LD	988,657	988,657	988,657	Progressed directly through Executive Team. <b>Approved</b>	N/A

# 2025/26 Investment Case Update (3 of 3)

Annual Plan Category	CCG / Directorate	Description	Annual Plan Provision £	Approved 25/26 £	Approved Recurrent £	Status	Formal Executive Team consideration
Local Future Investments	Central Reserves	Band 2/3 HCSW Pay Dispute	2,261,379			National/HR/corporate nursing process will determine appropriate costs, not an investment case per se. Provision scaled back from £2.3m to £2.0m Q1. November update: National framework agreed February update: recognition and corrective payments to be transacted in new year final staff numbers reduced from earlier estimates, final costs being assessed with Payroll.	N/A
Not included in the financial plan	Estates and Facilities	Additional fire wardens required at WGH	0	0	205,000	<b>Approved</b> (costs start Sept '26) In the absence of reserve funding, budget will be aligned through the 26/27 planning cycle.	04/06/2025
Not included in the financial plan	Estates and Facilities	Additional fire wardens required at GGH	0	153,922	205,000	<b>Approved</b> In the absence of reserve funding, costs in 25/26 will generate a deficit variance - budget will be aligned through the 26/27 planning cycle.	04/06/2025
Not included in the financial plan	Director of Public Health	Health Coaches - pursuing VBHC funding initially	0			Linked to VBHC funding to pilot. Progressed through batch 2, further work required, updated proposal submitted - scrutiny process to recommence aligned to the annual plan 26/27. Exec decision to pause potential investment until latter stages of 25/26, dependent on availability of VBHC funding. Plan to be considered as part of 26/27 planning priorities, VBHC funding not an option, plan being reviewed in relation to affording the costs through Public Health underspends.	TBC
Not included in the financial plan	Community and Integrated Medicine	BGH EUCC Nursing	0	1,330,000	2,210,000	Case considered at Executive team in November and supported, minimal impact 25/26 given recruitment timelines and existing staffing provision - level of costs already being incurred in the current run rate. <b>Approved</b> . Funding implications being reviewed in respect of existing variable pay budget through the 26/27 annual plan process. N.B. Total investment required £2,210k to substantiate existing workforce and expand in certain areas, £1,660km cost already committed.	12/11/2025
Not included in the financial plan	Community and Integrated Medicine	GGH ED Nursing	0			Deferred, pending paper	TBC
<b>Total</b>			<b>11,855,024</b>				
<b>Approved Total</b>				<b>8,595,097</b>	<b>10,249,885</b>		