



Royal Berkshire NHS Foundation Trust

Human Resources Budgeting and Planning

Context

Royal Berkshire NHS Foundation Trust is one of the largest general hospital foundation trusts in the country, providing acute medical and surgical services to Reading, Wokingham and West Berkshire and specialist services to a wider population across Berkshire and its borders. With over 4,800 staff, more than 900 beds and an annual budget in excess of £290m, the Trust faces formidable planning challenges to ensure continued high quality patient care in the face of tighter budgets, rising costs and major structural healthcare reform.

Business Issue – HR Planning & Monitoring

Planning and monitoring headcount and related costs has always formed part of the Trust's regular budgeting cycle, but with the changes taking place in the healthcare environment there was increasing demand to capture, analyse and report budgets at a lower level of granularity, more accurately, and with greater efficiency using fewer resources. Their existing toolset was based on a relational database that was labour intensive and time-consuming to operate and administer. Its lack of flexibility made it cumbersome to model and test different scenarios, leaving managers to rely on a high level of manual operations and estimates, resulting in a degree of mistrust of the results by budget holders and other users.

Capabilities Required

The budgeting and planning group within the Finance Department wanted a budgeting and planning tool that would be easy for them to use, customise and develop, that was flexible, fast and scaleable, and allowed them to do both top-down and bottom-up planning. It should require a minimum of IT support, with finance professionals in control of the accuracy of its output, of the budgeting and planning process and of its evolving structure over time.

How Mazepoint Helped

The Royal Berkshire team chose Mazepoint's Business Intelligence suite supported by a consulting team with experience in implementing similar budgeting and planning tools. The suite's tight integration with Excel provided a familiar working environment, and its built-in planning functions, such as scenarios and data "splashing" would save users a considerable amount of time in preparing budgets. The cost of the software was very competitive with the alternatives available, which enabled the consulting team to help Royal Berkshire develop, test and implement the budgeting and reporting models, together with the data integration processes, within a period of 3 months.

Results

The system gives the finance team far more flexibility in budget preparation compared to previous tools used. They can analyse information much faster and there is greater transparency of bottom-up budgets. Budget holders are more inclined to accept ownership of their respective budgets, and they can see exactly how the budget has been built up thanks to the complete audit trail that removes much of the "guesswork" from the budgeting process. The cost of IT maintenance and support has been substantially reduced and the budgeting process can now be managed with just two people. Training costs have also been cut dramatically as much of the working environment is so compatible with Microsoft Excel.

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