



Strategy to 2025

**Leading
E&F services
through
challenge and
change**

Strategy to 2025

1.0 Introduction.

1.1 In 2016 HEFMA published the “Strategy to 2020” which set out our plans and aspirations for the following four years. The strategy focussed on developing the Association through four ‘key deliverables’:

- Policies and Procedures
- Systems and Software
- Training and Development
- Business Influence

Through these key deliverables individual objectives were developed and actioned. Whilst the majority of the intended actions were fully completed, there were some that remain ongoing to address longer term initiatives and to provide continuity in HEFMA’s development. These have been drawn into the Strategy to 2025.

1.2 It had been intended that this Strategy would be launched at HEFMA’s National Forum in May 2020 but this event was cancelled due to the World Coronavirus Pandemic which began to take hold in early 2020 and forced the suspension of all activities of the Association from March of that year. Consequently, the Strategy was scheduled for launch in November, although some actions had already progressed as the pandemic restrictions were eased during the summer.

2.0 Development of the Strategy.

2.1 The National Council of HEFMA began considering the key strategic aims for 2020 onwards at dedicated meetings in the latter half of 2019 and into early 2020. The process was initially informed by a review of the current activities and commitments remaining from the “Strategy to 2020”, a detailed financial and resources assessment and a presentation by our colleagues at NHS Improvement of the likely NHS priorities in the coming years.

2.2 The discussions around the key priorities of the Association also focussed on the views and opinions canvassed from Branch Chairs and drawn from the membership of their Branches.

2.3 As with all democratic organisations such as HEFMA, a strong focus on governance and accountability is always required. This was reflected on during the development of this Strategy to 2025 and it was agreed that ongoing improvements to existing policies and practices to ensure good governance of the Association would be part of the strategic aims.

3.0 Strategic Principles

- 3.1 The value of working collaboratively with all willing partners, but especially our strategic partners at IHEEM, HCA and AHCP, is vital to delivering on our future strategy. The ability to pool our thinking, resources and influence will be key to driving the E&F professions forward and shaping the future working environments and career paths for our members. Our aims are aligned to those of most professional bodies supporting the delivery of healthcare and are equally consistent with the stated policy aspirations of NHS England & NHS Improvement. Whilst HEFMA's Strategy to 2025 must deliver first and foremost for our members, it is also vital for it to support UK healthcare services and their direction of development. Our collaboration with all willing partners is intrinsic and implied in all parts of this strategy.
- 3.2 As a membership organisation staffed by volunteers, HEFMA is limited in its resources to invest in specific objectives, from both a human and financial standpoint. Consequently, this Strategy to 2025 has been developed with the intention of utilising our ability to influence, lead and educate, rather than solely looking at actions incurring expenditure. This view was strengthened by the need to manage our costs more stringently following the loss of one of our main income streams for the year owing to the cancellation of the 2020 Forum in May due to the Coronavirus Pandemic. As a result, the strategy has been developed through identifying the concerns of the professions and members, and where the resolution of these concerns is beyond the direct control or remit of HEFMA, developing objectives where influence can be brought to bear to effect positive change. The impact of the pandemic on our future finances, and those of our contractors and sponsors, may prevail for some time, and could have a long-term influence. This may affect our delivery timescales for this strategy and will require constant review.
- 3.3 The distilled strategic aims identified in this document have been consulted upon with members and ratified by the National Council of HEFMA and constitute the primary elements of the action plans of the Association to 2025.

4.0 Key themes of the HEFMA Strategy to 2025

4.1 The development of the strategy identified four key themes that reflect the areas of development HEFMA will pursue in order to achieve its aims. These are headed **Workforce, Sustainability, Digitalisation and Compliance** and are described in more detail in the following sections.

5.0 Theme 1 - Workforce

5.1 Workforce sustainability is considered to be the biggest single concern facing the future of healthcare and in particular the E&F professions that support patient care. The demographics of the current workforce mean it is an area that HEFMA must act on and exert influence to avert a crisis in the workforce provision in the near future.



5.2 The two key areas of strategic focus for HEFMA related to the Workforce theme are:

- Raising the profile of Estates and Facilities as a career choice
- Shaping the education that supports the development of the workforce

5.3 HEFMA recognises the changing landscape of health and social care in the UK, particularly the development of STPs, and the trend for more merged, multi-disciplinary organisations cutting across traditional service boundaries. This will have an impact on future workforce requirements. To ensure that the NHS E&F services have a professional and adequately skilled workforce that is sufficient in numbers, requires investment in succession planning and apprenticeship schemes; providing a clear and concise career route map from ‘apprentice to boardroom’ and all steps in between, whilst providing career advancement opportunities, job satisfaction and reward.

5.4 HEFMA will collaborate with and support any willing partner who can bring about change in the marketing and attraction of working in the E&F services in the NHS and wider health and social care alongside the training and development of new and existing staff and the creation of apprenticeships and leaders of the future. This must include exerting influence to address parity of pay between NHS bodies and the commercial organisations that compete for employees.

5.5 The objectives for the **Workforce** theme of this strategy will be:

- Influence and support the NHS national workforce strategy to address recruitment, retention, diversity and appropriate pay structures across E&F services in healthcare and develop model structures for healthcare organisations
- Drive a campaign to change the traditional perception of the NHS and healthcare workforce as predominantly made up of Doctors and Nurses and raise awareness of the importance and diversity of job roles in the E&F professions
- Develop resources to market healthcare E&F services as a career of choice across all sections of society and drive diversity, inclusion and representation in healthcare organisations
- Support and influence the creation of a national apprenticeship structure and programme of training for all professional groups in healthcare E&F services
- Support the ongoing development of a comprehensive career route map to inform potential employees, recruiters and existing staff of the career advancement opportunities in healthcare services
- Provide opportunities for education, training and knowledge sharing for members to develop their skills and experience across the requirements of their job roles and to position them to make the most of all career development opportunities
- Develop ways to help HEFMA's membership develop personal resilience, mindfulness and mutual support to protect them from the pressures of working life

6.0 Theme 2 - Sustainability

6.1 The global climate crisis and worldwide concerns about environmental issues are now requiring more stringent and timely action to be taken by governments and corporations around the world. This will be an increasing priority on the healthcare industry, which will not only be impacted by the public health effects of this crisis but remains a very high energy and resource consumer and environmental polluter. The publication and launch of the NHS strategy “Delivering a ‘Net Zero’ National Health Service” on 1st October 2020 outlines the future direction of E&F projects and operations.



6.2 The two key areas of strategic focus for HEFMA related to the overall Sustainability theme are:

- Raising awareness of environmental issues and policies to address sustainability
- Providing training and development opportunities for members

6.3 This theme will address all aspects of ‘Sustainability’ and will address the support necessary to deal with environmental and climate change concerns and the corporate social responsibilities of healthcare providers and the professions that HEFMA represents and supports. The theme will also look internally to the sustainability of HEFMA and ensure that it is able to continue to thrive within its resource limitations and remain relevant within the changes to the health and social care structures that it supports and operates in.

6.4 HEFMA will provide support to the membership around environmental sustainability and climate change issues via education and training, shared development of policy and guidance and providing networks for specialists and experts in the field to be accessed by members at branch or individual level.

6.5 The objectives for the **Sustainability** theme of this strategy will be:

- Support the development of the sustainability agenda for all E&F services and develop the understanding of the importance of mitigating the impact of climate change in healthcare
- We will support and publicise the findings and recommendations of the NHS “Delivering a ‘Net Zero’ National Health Service” strategy
- We will champion the principles of ‘good corporate citizenship’ in healthcare bodies and share good practice case studies with the membership
- We will ensure the delivery of awareness and training events at frequent intervals to our members, utilising industry experts and academia, to further the specialist knowledge and capabilities of the FM workforce in environmental management to improve the operational efficiency of the healthcare estates and facilities

- We will support the ongoing work of specialist energy groups within the HEFMA membership to encourage knowledge sharing, understanding of national policy and embedding best practice in energy monitoring and targeting
- We will utilise our membership to influence policy and procedure in the NHS and wider healthcare, with reference to embedding good environmental management into E&F operations and infrastructure developments
- We will champion the use of 'whole life costing' for all asset investment business cases to ensure competent decision making and sustainable developments
- We will ensure HEFMA remain operationally sustainable and resilient to market changes and support members to address the pressing climate and environmental agenda

7.0 Theme 3 - Digitalisation

7.1 The Digitalisation agenda is rapidly gathering pace across all aspects of healthcare and will become an essential part of the vocabulary of FM managers. NHSX is developing programmes that aim to “accelerate procurement, deployment and uptake of technology that is needed to underpin digital transformation”. It is intended that this will provide NHS trusts with a core set of digital capabilities to enable the use of digital technology to transform healthcare services.



7.2 The two key areas of strategic focus for HEFMA related to the overall Digitalisation theme are:

- Raising awareness of digital advancements and benefits
- Providing training and development opportunities for members

7.3 HEFMA will champion and support the propagation of digital technologies in FM services to support such developments as Building Information Modelling, ‘Digital Twins’, Artificial Intelligence, the ‘Internet of Things’, and other national and international innovations in digital healthcare and the efficient operation of assets. HEFMA will continue to support NHS initiatives centrally and provide resource to assist in the development and dissemination of national policies and guidance on the whole digital agenda.

7.4 The strategy will aim to support the membership in developing a greater awareness of the marketplace, applications, practical requirements and benefits of digital technologies, in order to increase the ability across the professions to integrate technologies, develop coherent strategies for implementation, produce robust business cases and develop the workforce and skills to enable the full exploitation of digital technologies in the future.

7.5 The objectives for the **Digitalisation** theme of this strategy will be:

- Support the development of the digitalisation agenda for all E&F services and develop the understanding of the importance of IT in healthcare.
- We will engage with the digital technology marketplace to ensure innovations are brought to the attention of the FM workforce in healthcare without commercial commitment or coercion.
- We will ensure that worldwide academic studies, articles and case studies focussing on the use of digital technologies are disseminated to our membership through our media and publications channels in a balanced and educational manner.
- We will ensure the delivery of awareness and training events at frequent intervals to our members, utilising industry experts and academia, to further the specialist knowledge and capabilities of the FM workforce and enable the informed deployment of digital technologies to improve the operational efficiency of the healthcare estates and facilities.
- We will utilise our market exposure and the practical experience of our members to drive development of health focussed innovations that support the FM services of our members.
- We will utilise our membership to influence policy and procedure in the NHS and wider healthcare, with reference to embedding digital technologies in all future infrastructure developments.
- We will champion the production, analysis and use of high-quality estates and facilities data to drive insight and information for the betterment of future FM delivery.

8.0 Theme 4 - Compliance

8.1 All healthcare providers have a duty to operate in a manner compliant with all relevant statutory, regulatory and corporate standards. Arguably E&F services are some of the most regulated and strictly controlled aspects of the healthcare business. HEFMA recognises that the ability to maintain and demonstrate compliance with legislation and healthcare standards represents a major challenge for all those working in E&F services. The published figures for NHS backlog maintenance indicate how E&F services have been struggling to ensure compliance with legislative and mandatory requirements for a significant number of years. The burden of evidencing compliance and best practice is increasing and the ability to maintain up to date knowledge of regulation and standards across a wide range of professional disciplines remains challenging.



8.2 The two key areas of strategic focus for HEFMA related to the Compliance theme are:

- Providing training and development opportunities for members
- Improving the internal governance and compliance of HEFMA as a membership association

8.3 HEFMA will continue to support members in this area of work by providing education and training opportunities at all levels and supporting the NHS centrally to develop and promote tools and guidance, such as the Premises Assurance Model, to help manage this critical area of work. This will involve working with any willing partners who can provide training and education opportunities to enable existing E&F practitioners to keep updated on legislative compliance, standards and guidance, and to bring more junior staff and new starters up to speed on the requirements of their roles and future careers.

8.4 HEFMA will continue to work with the NHS centrally to develop and update standards and guidance specifically for use in healthcare settings and will publish occasional articles and updates to ensure wider awareness of compliance subjects is communicated.

8.5 The objectives for the **Compliance** theme of this strategy will be:

- We will continue to work with the NHS centrally to support the development and updating of standards and guidance specifically for use in healthcare settings (such as National Cleaning Standards, Patient Food, Health Technical Memoranda and Health Building Notes) and will publish articles and updates from time to time to ensure wider compliance subjects are communicated.
- We will take up every opportunity to support and influence the development and updating of legislation, formal guidance and British Standards relevant to healthcare facilities provision and will ensure members are made aware of any emerging or reviewed documents.
- We will work with any willing partners to provide training and education opportunities to enable members to maintain their knowledge of legislation, guidance and standards.
- We will deliver relevant support to members in developing case studies around the reporting tools developed centrally in the NHS such as the Model Hospital, Premises Assurance Model, ERIC and PLACE assessments by helping to share best practice across the membership.
- Encourage and support members to produce and test detailed resilience plans to ensure they can effectively lead their organisations through serious service disruptions.
- In line with the Workforce theme of this strategy, we will work to develop the NHS defined roles of 'Responsible Person', 'Authorised Person', 'Competent Person' and 'Independent Advisor's or 'Authorising Engineers' in order to support member's understanding of compliance and best practice but also to expand individual career prospects for members.
- We will ensure that the governance of HEFMA is continually reviewed and updated to ensure policies and procedures are in place and fully applied in all cases in respect of financial control, procurement, risk and transparency. This will include the development of a new 'Governance Manual' to ensure probity and clarity around the working practices and standards of operation of the association.
- The National Council of HEFMA will develop an updated Constitution for the Association which will ensure HEFMA remains relevant and viable into the long-term future.

9.0 Management of the Strategy

- 9.1 The objectives identified in this strategy will be delivered via a fully resourced action plan over the duration of the strategy which will be informed by a benefits analysis process. National Council will review and report progress against the plan at every meeting and will hold objective leads accountable for delivery of the Strategy.
- 9.2 Whilst this Strategy to 2025 represents a long-term programme of work, it is recognised that the rate of change in the structures, technologies and delivery of health and social care in the UK will inevitably require annual reviews of the Association's workload. Coupled with the ongoing uncertainties around the worldwide Coronavirus pandemic and its impact on the financial position, this may also require a more substantial refocussing of HEFMA's strategic direction within the term of the current programme of work. If this proves necessary, an interim revised strategy will be produced and consulted upon to ensure the Association remains relevant and focussed on its constitutional aims.

***National Council
Health Estates and Facilities Management Association
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The logo for Hefma, featuring the word "hefma" in a blue, lowercase, sans-serif font. The letter 'h' is stylized with a horizontal line extending to the left. Below the main text, the full name "HEALTH ESTATES & FACILITIES MANAGEMENT ASSOCIATION" is written in a smaller, blue, uppercase, sans-serif font.

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