

Business plan 2024 to 2025

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Message from the Ombudsman and Chief Executive Officer

As we enter the final year of our strategy for 2022 to 2025, it's an exciting time to be leading the Parliamentary and Health Service Ombudsman (PHSO).

The last year was one of immense change. After seven years of service, Rob Behrens finished his term as Ombudsman and Amanda Amroliwala left as Chief Executive. They left behind an organisation that is adaptable, resilient and makes a genuine difference to people's lives. It is critical now that we build on their legacy to be able to deliver the best possible service for the future.

We are immensely proud to take up our roles as Ombudsman and Chief Executive Officer. The work of PHSO is vital both to enable access to justice for those who have experienced public service failings and to improve those services by identifying and addressing systemic weaknesses. As a team, we are united in our desire to continue delivering a high-class service to complainants and those we investigate. As the Deputy Ombudsman, Karl Banister will provide critical support in this ambition.

The demand for our service continues to rise at unprecedented levels. We have made great progress in reducing the time that complainants wait for their case to be allocated, and this will continue to be our priority over the coming year. This means we need to do things differently.

To make sure our casework is wide-reaching and improves public services for everyone, we will continue to focus our available resource where it can achieve the biggest possible impact. Putting in place our new casework strategy, including our approach to systemic investigations, will help us manage the increased demand on our service while delivering greater public value.

We will continue to put people at the heart of our design and delivery, creating a truly user-focused and accessible service at every level. We will strive to listen, understand and further remove barriers to complaining, running outreach campaigns targeted towards underrepresented groups and engaging directly with MPs. This work is vital to raise awareness of our role, protect individuals' rights and help as many people as possible access justice.

To take forward our ambitions, we have a new Executive Team in place. We have been joined at the start of the year by two new directors. Our new Director of Strategy, Scott Stevenson, will lead our policy, public affairs, communications and engagement functions to help us achieve greater impact. In addition to growing our strong public voice on how to strengthen our national public services, this team will continue our influential work on the Complaint Standards, delivering training for NHS staff, rolling out the standards for the UK Government, and evaluating and reporting on them.

A new post of Chief Digital Information Officer has been established. John Owen will lead our transition to a modern digital Ombudsman service and grasp the capability of the latest technology to help the public reach us, to improve the service they receive, and to help us become more efficient. Under John's leadership, our new Data, Digital and Technology function will develop our systems for call recording and transcription, strengthen our data capabilities and implement our multi-channel, digital-first casework service. Living our value of transparency, we are moving to a publish-by-default policy to increase the number of cases published on our website. This will be a valuable resource for the public and public services to learn from past mistakes.

Underpinning everything we set out to achieve is our people. We know that our teams value the supportive working environment in our offices. However, we are not complacent and need to invest further to ensure that all colleagues benefit from a culture of collaboration, trust and knowledge-sharing, where their wellbeing is prioritised. Over the coming months, we are especially keen to see the results of our Citygate office refurbishment, which will build on our hybrid ways of working and provide a flexible and engaging environment.

This business plan will support progress towards our vision of being a voice for improvement in public services. We look forward to this year with optimism and enthusiasm, knowing that we will deliver more justice, more opportunities for learning, and more evidence of the transformative power of complaints.

Rebecca Hilsenrath, Parliamentary and Health Service Ombudsman

Gill Kilpatrick, Chief Executive Officer

Business plan activities

Our objectives are set out in [our corporate strategy for 2022 to 2025](#).

Description and outline scope	Link to the strategy	Owner	Confidence	2022-23 activity	2023-24 activity	2024-25 activity
<p>New Ombudsman</p> <p>We will support and raise the profile of our new Ombudsman</p>	Objective 1	Chief of Staff	Medium	-	<ul style="list-style-type: none"> Support the appointment of an interim Ombudsman Support the appointment of a permanent Ombudsman 	<ul style="list-style-type: none"> Support the onboarding and induction Understand the vision of our new Ombudsman to develop our 2026-29 strategy
<p>Engagement with MPs</p> <p>We will engage with MPs to maintain our credibility and relevance, and ensure a pipeline of parliamentary cases</p>	Objective 1	Director of Strategy	High	-	-	<ul style="list-style-type: none"> Develop and deliver MP stakeholder engagement plan

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<p>Working with government agencies to drive systemic change and support improvements to public services</p> <p>We receive very few complaints about the Department for Work and Pensions (DWP) from people in receipt of benefits so we are unable to support improvements in decision-making. We will work with government agencies to make sure we are better placed to advise on system improvement</p>	Objective 1	Director of Strategy	Low	-	<ul style="list-style-type: none"> • Research and produce findings on benefit claimants who have been unable to access their benefit entitlement, the reasons why and how we can investigate their complaints 	<ul style="list-style-type: none"> • Pilot work with government agencies established • Pilot concluded, and report and recommendations produced • Stakeholder engagement plan developed and delivered
<p>Casework Programme</p> <p>We will put people at the heart of the design</p>	Objectives 1 and 2	Chief Digital and Information Officer and	Medium	<p>Scoping, definition and discovery including:</p> <ul style="list-style-type: none"> • organisational engagement on 	<ul style="list-style-type: none"> • Move into design and delivery phase of programme and complete blueprint 	<ul style="list-style-type: none"> • Public value model version two and version three design and build

Description and outline scope	Link to the strategy	Owner	Confidence	2022-23 activity	2023-24 activity	2024-25 activity
<p>and delivery of services at all stages of the complaints process, ensuring that everything we do - from initial inquiry to case completion - creates a genuinely user-focused service.</p> <p>We will move to a digital-first approach for complaints processing, providing a convenient service that will be integrated across online, telephone and postal channels - enabling everyone to contact us and access our services in the way that works best for them.</p>		<p>Director of Operations, Legal and Clinical</p>		<p>vision, aims and objectives</p> <ul style="list-style-type: none"> • internal focus groups to gather requirements • developing Systemic Casework Strategy • development of digital business case • complete define stage of the programme • Casework Programme roadmap • set up our Public Engagement Advisory Group and recruit to group (first meeting will be 19 April) • research and planning of outreach activity 	<ul style="list-style-type: none"> • Start user experience engagement through the Public Engagement Advisory Group and outreach work, including a minimum of four panels • Outreach pilots start, based on external intelligence and YouGov research • Demand and forecasting model version one designed and implemented • Design and implementation of Model Office • Prioritise, scope, plan and begin implementing improvements to compliance, human 	<ul style="list-style-type: none"> • Implement our Casework Strategy, including our approach to systemic investigations • Decisions on human rights, human factors, compliance made and implemented • First phase online self service • Operations 2025 - the operating model will be agreed and adopted • Outreach campaigns focused on underrepresented communities who face greatest barriers to accessing our service

Description and outline scope	Link to the strategy	Owner	Confidence	2022-23 activity	2023-24 activity	2024-25 activity
<p>We will manage casework dynamically to make informed, strategic and transparent choices about which complaints we are able to take forward in a timely manner with available resources, to ensure that we maximise public value.</p> <p>We will ensure that our complaints service is accessible, equitable and inclusive to all.</p> <p>We will ensure that we are aware of and attract those complaints that enable us to have the greatest impact on improving public services.</p>					<p>rights, human factors and systemic</p> <ul style="list-style-type: none"> • Casework strategy identifies priority and systemic casework 	

Description and outline scope	Link to the strategy	Owner	Confidence	2022-23 activity	2023-24 activity	2024-25 activity
<p>Data, Digital and Technology (DDAT) activities</p> <p>The DDAT Strategy will be delivered through the Casework Programme and BAU (business as usual) roadmap.</p>	<p>Business-critical enabler that supports all aspects of the strategy</p>	<p>Chief Digital and Information Officer</p>	<p>Medium</p>	<ul style="list-style-type: none"> • Research and development of the strategy, including development of the benefits (initial focus on casework through the Casework Programme) 	<ul style="list-style-type: none"> • Develop the organisation-wide DDAT Strategy, with key component the business case for digitising casework • Develop the DDAT roadmap for delivery for 18 months • Call recording and transcription design and build • Start NHS integration project • Define and design multi-channel casework digital service to receive complaints online using user experience (UX) • Improved casework data and quality to support actionable insight and data 	<ul style="list-style-type: none"> • Go live with call recording and transcription • Finance system design, build and implementation • Implement NHS integration and insight from data project which will build our data capabilities • Implement new DDAT function • Continue design, build and implementation of multi-channel casework digital service • Consider portfolio management software options

Description and outline scope	Link to the strategy	Owner	Confidence	2022-23 activity	2023-24 activity	2024-25 activity
					availability, including geographic searches and NHS clinical coding trends and themes <ul style="list-style-type: none"> • Build flexible data architecture • Finance system procurement • Go live with Security Operations Centre • Egress renewal and potential replacement • Review of Data, Security and Privacy and ICT to design new DDAT function 	
<p>Developing our people and culture</p> <p>Create a great place to work with an engaged, diverse and inclusive culture where everyone</p>	<p>Business-critical enabler that supports all aspects</p>	<p>Assistant Director of People and Talent</p>	<p>High</p>	<ul style="list-style-type: none"> • Develop the People and Talent Strategy • Transfer strategy to operational action plans • Launch Future Working Framework 	<ul style="list-style-type: none"> • Continuation of Authentic Leadership Senior Leadership Team programme • Deliver the Active Inclusion programme, initially 	<ul style="list-style-type: none"> • Continue to embed Strategic Workforce Planning, including talent management, career paths and succession planning

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<p>lives our values and works collaboratively to achieve our common goals, committed to continuous improvement and learning, and high performing.</p>	<p>of the strategy</p>			<ul style="list-style-type: none"> • Review of Terms and Conditions • Review of pay and grading • Deliver Authentic Leadership activities including: Senior Leadership Team coaching programme, Coaching Framework • Develop the Active Inclusion programme 	<p>focused on race and anti-racism</p> <ul style="list-style-type: none"> • Implement Total Reward Strategy, including total remuneration, pay and grading, and performance management • Implement Resourcing Strategy • Embed new HR policies via coaching and upskilling managers • Develop new management development training 	<ul style="list-style-type: none"> • Develop and implement values-based recruitment principles • Support organisational change, including implementing Strategic Workforce Plans • Review of Flexible Working Framework • Review of iTrent HR system with possible procurement for alternative from Q3 onwards

Description and outline scope	Link to the strategy	Owner	Confidence	2022-23 activity	2023-24 activity	2024-25 activity
<p>Maintaining the casework queue within frictional levels</p> <p>Managing increased demand for our service through our public value model and efficiencies delivered through the Casework Programme.</p>	Objective 2	Deputy Director of Operations	Medium	<ul style="list-style-type: none"> We have expanded our casework teams by a further 36 posts, on top of the 14 posts we added in the first half of 2021-22 	<ul style="list-style-type: none"> We will maintain casework staffing at 2022-23 levels to reduce the queue to frictional levels by March 2024 Version one of our public value model will go live in Q4. Development of version two will continue throughout Q4 	<ul style="list-style-type: none"> Version two of the public value model will go live in Q1/Q2. Versions will iterate subject to the data that becomes available and the levels of automation that can be achieved to analyse data
<p>Developing the casework publishing platform and publishing all our casework</p> <p>We will make improvements to how we publish cases on our website to make it more accessible and easier to navigate, increasing</p>	Objective 1(b)	<p>Assistant Director of Communications</p> <p>Assistant Director of Senior Casework</p>	Medium	<ul style="list-style-type: none"> Identify ways to improve the publishing process, including possible solutions for anonymising complaint reports Identify accessibility and navigation improvements 	<ul style="list-style-type: none"> Implement accessibility and navigation improvements to online platform Impact assess the publishing process improvements, including any cost benefit analysis Assess and set targets for 	<ul style="list-style-type: none"> Deliver training and guidance on any new processes or standards Automate publication of cases

Description and outline scope	Link to the strategy	Owner	Confidence	2022-23 activity	2023-24 activity	2024-25 activity
engagement with the cases we publish. We will streamline the publishing process so that all suitable cases can be published.					increasing publication of cases <ul style="list-style-type: none"> • Consider whether our quality standards need to change to support publishing improvements 	
Complaint Standards We will evaluate how effectively the Complaint Standards for public sector and NHS complaint handling are being embedded to identify barriers and enablers and increase our impact on frontline complaint handling.	Objectives 2 and 3(a)	Assistant Director of Engagement	High	<ul style="list-style-type: none"> • Evaluate and report on NHS pilots • Roll out NHS Complaint Standards • Consult on Government Complaint Standards 	<ul style="list-style-type: none"> • Evaluate and report on NHS Complaint Standards • Pilot Government Complaint Standards 	<ul style="list-style-type: none"> • Continue to deliver NHS standards training • Roll out Government Complaint Standards • Evaluate and report on NHS and Government Complaint Standards
Office refurbishment We will review our accommodation in Manchester and London to ensure we are making	Business-critical enabler that supports delivery of	Assistant Director of ICT and Facilities	High	<ul style="list-style-type: none"> • Make decisions on future London and Manchester office space 	<ul style="list-style-type: none"> • Approve designs for the refurbishment of Citygate office and start in Q4 	<ul style="list-style-type: none"> • Complete the refurbishment of the Citygate office

Description and outline scope	Link to the strategy	Owner	Confidence	2022-23 activity	2023-24 activity	2024-25 activity
efficient use of the space and providing an engaging and collaborative environment.	our strategy and service			<ul style="list-style-type: none"> • Use consultancy to develop the design of Citygate office • Refurbishment of Millbank office 		
<p>Value for money</p> <p>We will further develop our approach to value for money, including assessment of the use of the Public Value Framework and strengthening value for money for investments.</p>	Business-critical enabler that supports delivery of our strategy and service	Assistant Director of Finance	High	-	<ul style="list-style-type: none"> • Desktop exercise to assess value and proportionality of the Public Value Framework, with future approach agreed with Audit and Risk Assurance Committee • Strengthen value for money assessment of use of resources and reporting, and integrate within business as usual • Undertake a value for money review across all services and make recommendations 	<ul style="list-style-type: none"> • Contract and procurement review schedule embedded in business as usual • ICT license review • Implement agreed recommendations from Strategic Workforce Planning • Review of Governance structure, including committees and panels

Description and outline scope	Link to the strategy	Owner	Confidence	2022-23 activity	2023-24 activity	2024-25 activity
					<ul style="list-style-type: none">• Total cost of employee review to identify opportunities for cost savings• Contract and procurement review schedule prioritised in business as usual	

Outcomes and measures

Our objectives are set out in [our corporate strategy for 2022 to 2025](#).

Activity	Link to the strategy	Outcomes (what we want to achieve)	Measures (how we'll know if we've done it)
New Ombudsman	Objective 1	<ul style="list-style-type: none"> • A smooth transition to a new Ombudsman • Key stakeholders aware of appointment • Understanding Ombudsman's vision and values • Ombudsman is fully supported to perform their duties 	<ul style="list-style-type: none"> • Plan delivered successfully • Feedback from Ombudsman
Engagement with MPs	Objective 1	<ul style="list-style-type: none"> • Greater awareness of our service with MPs • MPs actively refer their constituents to our service 	<ul style="list-style-type: none"> • Number of MP referrals received • Conversion rate from referral to investigation • Stakeholder perceptions research (2026 to 2027)
Working with government agencies to drive systemic change and support improvement to public services	Objective 1	<ul style="list-style-type: none"> • Greater understanding of how we can increase complaints from service users about their benefits entitlement 	<ul style="list-style-type: none"> • Successful delivery of pilot plan • Pilot gives measurable insight • Established capability to monitor volumes of benefits complaints

Activity	Link to the strategy	Outcomes (what we want to achieve)	Measures (how we'll know if we've done it)
Casework Programme	Objectives 1 and 2	<ul style="list-style-type: none"> • Wider access to our service • Improved ability to make impactful, evidence-based and actionable recommendations • Increased efficiency of complaint handling • More effective management of casework changes 	<ul style="list-style-type: none"> • Number of channels to access our service • Volume of complaints in each channel • Recommendations complied with (and within target) • Number of case closures per full-time equivalents (FTE) • Report progress against outputs delivered
DDAT Strategy and Roadmap	Business enabler	<ul style="list-style-type: none"> • Increased access to our service through digital channels • Maximise data-driven insight and analysis • Increased sustainability, efficiency and security of our technology • More digitally confident workforce • Reduction of waste (automation) 	<ul style="list-style-type: none"> • Reduction of volume through older channels and increased shift to new digital channel(s) • Increase in available data • Report progress against delivered outputs • Security operations centre (SOC) report on technology security
Developing our people and culture	Business enabler	<ul style="list-style-type: none"> • Greater strategic workforce planning • Ability to recruit the right people into the right jobs • Increased diversity of workforce • Reduced staff turnover • Greater levels of staff engagement 	<ul style="list-style-type: none"> • Clear workforce plan available • Appropriate representation in all areas and grades • Staff engagement score

Activity	Link to the strategy	Outcomes (what we want to achieve)	Measures (how we'll know if we've done it)
Maintaining the casework queue within frictional levels	Objective 2	<ul style="list-style-type: none"> • Ability to categorise cases of public value • Increased capacity to focus on the impactful cases in a timely way • Improved ability to predict and respond to potential demand for our service • Prevention of future queue build-up 	<ul style="list-style-type: none"> • We have the ability to categorise cases of public value • Queue size - allocated and unallocated • Progress against agreed forecast of unallocated complaints at primary investigation
Developing the casework publishing platform and publishing all our casework	Objective 1	<ul style="list-style-type: none"> • Increased automation and efficiency of publication process • Increased accessibility of the platform • Increased engagement with our platform • Increased visibility of the totality of our casework 	<ul style="list-style-type: none"> • Number of cases published • Percentage of defined decisions published • Number of views of platform
Complaint Standards	Objective 3	<ul style="list-style-type: none"> • Greater awareness of Complaint Standards • Greater evidence that organisations we investigate have changed their practice • Increased skills and quality of frontline complaint handling • Reduction in complaints with a complaint handling issue 	<ul style="list-style-type: none"> • Number of positive outcomes
Office refurbishment	Business enabler	<ul style="list-style-type: none"> • Improved sustainability of office fixtures and fittings • Increased number and variation of work settings • Increased accessibility of our working environment • Improved use of office resources • Reduced silo-working 	<ul style="list-style-type: none"> • Number of work settings available • Citygate capacity figures and utilisation reports • Qualitative staff feedback • Number of reasonable adjustment requests

Activity	Link to the strategy	Outcomes (what we want to achieve)	Measures (how we'll know if we've done it)
Value for money	Business enabler	<ul style="list-style-type: none"> • Improved and efficient budget management • Streamlined and efficient processes to identify, allocate and manage ICT licenses, minimising costs • Total cost of employee understood and tracked • Reduced risks of inefficient resource use • Lean and effective governance 	<ul style="list-style-type: none"> • Increase in Public Value Framework assessment scores • Savings released from Strategic Workforce Plan • Total cost of employee

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