



Castleman Healthcare Limited

Working with GP practices and Primary Care Networks

Annual Report for the 12 months up until March 2023



Introducing Castleman Healthcare

Castleman Healthcare is a not-for-profit GP provider company owned by 13 GP practices that form the three Primary Care Networks (PCNs): Network Poole North, Wimborne & Ferndown Primary Care Network and the Crane Valley Network.

Our GP practices collaborate as PCNs to improve care for patients, and we also come together as Castleman Healthcare so we can help our member practices and the PCNs meet the many challenges of delivering primary care.

We share resources and expertise so that duplication is minimised. We work in a way which delivers efficiencies, so together we can provide a wider range of services for over 130,000 patients. Staff from different practices contribute to the running of Castleman Healthcare, clinicians work in specialist roles to support the practices and we employ and have access to people with business skills who help us operate in a lean and efficient way.

Purpose of this document

We have produced this report to update our member practices on what we have collectively achieved in the 12 months up until 31 March 2023. It outlines our main achievements and our plans, as we embark on the next stage of our journey together.

We would like to actively encourage comment about the report from all our stakeholders. Please send these to info@castlemanhealthcare.co.uk.

Message from the Chair of the Board

I feel the pressure on General Practice in our time of 'recovery' has never been greater in my working life. As a company, Castleman is there with you.

As we have moved from a time of pandemic to a period of recovery, it is easy to forget the lessons we have all learnt throughout COVID19. Focus on the important things, look after yourselves and keep it simple. We continue to model these lessons in our core business.

Our focus throughout this year has been about support, as we said it would be in last year's report. We have supported our teams, including wellbeing support for general practice staff and coaching for those in practice leadership roles. We have supported NHS Dorset in its transition to a statutory body, counterbalancing that work in supporting the Dorset General Practice Alliance (the Alliance) to maintain the voice and business intelligence of the general practice workforce and advocating for quality of primary care for our patients. We have also supported the Primary Care Network Business Manager meetings co-chairing to ensure programme and business management is represented with service delivery and commissioning across Dorset.

We continue to support you clinically, with our ICPCS service offers of enhanced diabetes, respiratory, and frailty and integrated hub workstreams.

Over the 'winter pressures' months, with little notice, we launched the Acute Respiratory Infection Assessment (ARIA) Hub, rapidly expanding capacity for assessment of acute respiratory illness. We also recognised the pressures you all faced and funded locum backfill, allowing a small amount of respite in a strained operating environment. We also supported you with providing locum cover for Protected Learning Times to ensure your teams can fully participate in learning.

Next year, our aim is to continue in our supporting role. We will continue to support external partners, such as the Alliance and the ICB. We propose to expand our respiratory diagnostic capacity across our three PCNs, extend our wellbeing offer to build on its success and consider more widely how we can improve our training offer across our area of influence.

Throughout all we do, we have never lost sight of our values and our purpose of making your working lives easier. Your continued support of us as a Company, working on your behalf as shareholders, is very much appreciated.

Dr Dominic Hennessy

Our Objectives 2023/24

In 2022/23 the Castleman Board took time to review its purpose, mission and values. Everything we do is designed to support our GP member practices and the PCNs to which they are aligned, so they can provide the best care in the neighbourhoods where we operate.

In our last annual report we said that we would during 2022/23 continue to focus on the following three areas:

1. **Increasing services** beyond those provided for existing Castleman practices and widening the number of contracts managed.
2. **Continue to support the PCNs** to enable collaborative learning and financial savings, including marketing this to other PCNs.
3. **Building partnerships with external organisations** to develop a wider suite of business proposals, so Castleman can expand its portfolio.

We are pleased to confirm that we have delivered on these areas.

As a Company we are clear that our main aim is to support our practices. We are also committed to investing in additional support for the wellbeing of our staff. We did not however complete the task of how we will turn our vision of expanding the company into reality due to work pressures outside of the Company on our Directors, but we will turn our attention back to this in 2023/24.

During 2022, practices and PCNs continued to be challenged by the increased demand for healthcare and we were committed to supporting them so they could respond to this demand. We cleared a backlog created during the pandemic of patients who needed spirometry diagnostics, and established an Acute Respiratory Infection Assessment Hub (ARIA) from January to March 2023 to support practices meet the demand for appointments following the Group A Streptococcus outbreak in the winter.

We invested in wellbeing and resilience support for practice managers and reception teams and supported our practices with additional funding to support the payment of locum staff.

NHS Dorset asked us to support the development and set up of the Alliance with programme management and business support, a contract that has enabled us to widen our engagement across the Dorset Integrated Care System (ICS) and benefit all our practices. This contract has been extended for two more years.

With the development of the Alliance contract, the ARIA Hub and our continued management of our existing services Castleman has achieved greater financial stability for this year as well as strengthening the reputation of our business in Dorset.

We have continued to examine how to extend our reach to incorporate a wider range of opportunities into our business and are constantly exploring new and innovative opportunities to develop our portfolio.

We continue to rely on our Board members to deliver an increasingly demanding programme of work and these roles receive appropriate financial recompense.

As the pressures and demands on general practice and their PCNs continue, Castleman will continue to provide business and project management support to benefit healthcare improvements for our patients. As the Company is in a strong financial position we have agreed that there will be limited cross-charging to the practices in 2023/24.

Over the next 12 months we will:

- Continue to support our Shareholder practices and the PCNs to respond to the contractual obligations of delivering the Network DES where required.
- Continue to deliver on all existing contracts.
- Expand our offer of wellbeing support and leadership coaching to clinical leaders in each practice.
- Develop additional contracts that support Castleman to be sustainable and offer its employees and members a secure and robust future.
- Ensure our business structure and skills mix match the ongoing requirements of our business plan.
- Widen our offer to other PCNs, where this makes good business sense, so that patients can benefit in the long-term from the additional investment this will create.
- Continue to provide business management advice to the other PCN Business Managers and commissioners in Dorset and support with the regular business meetings by chairing these once a month.
- Develop Castleman's business by offering NHS Pensions and exploring CQC registration.

We will continue to focus on the following four areas in 2023/24:

1. **Increasing services** – looking for opportunities to enter into new markets.
2. **Continue to support our practices and PCNs** – being flexible and agile to be able to support when required.
3. **Building partnerships with external organisations** – using our expertise to generate and influence reach beyond our practices.
4. **Develop our business model** – establish Castleman as a fully-fledged NHS provider of services with CQC and provider of NHS pensions.

Achievements

During 2022/23 Castleman continued to support its shareholder practices with service delivery and with an additional focus on wellbeing for staff in general practice and this will continue in 2023/24.

We have expanded the Castleman portfolio by offering support to system partners. This has included working with NHS Dorset on local service reviews and providing primary care expertise; working with the NHS SW Regional Team to evaluate Castleman's ARIA Hub that will inform future models of care in providing an acute winter illness response; and providing the programme management expertise to the Alliance.

We have delivered services to benefit local patients, practices and partner organisations and once again have adapted these to match the changing and challenging needs of our communities and healthcare.

The Dorset General Practice Alliance

The Dorset General Practice Alliance (the Alliance) was formed in July 2022 to represent all general practices within the Dorset Integrated Care System (ICS). Castleman has facilitated the establishment of the Alliance and provides ongoing management of finance, personnel and project management support. This has included supporting the management of the Alliance Board meetings, two GP Summits and the production of a report on how general practice in Dorset can be sustainable, setting out a number of actions and recommendations for Dorset ICS to implement. This is one of the many ways that Castleman have increased our visibility within Dorset and achieved our aims of building partnerships with other organisations.

Castleman Wellbeing Support

Castleman is about supporting our practices and we recognised that we needed to support practice staff in order to be able to do their job. A series of resilience and wellbeing workshops for general practice staff and business/practice leaders was provided by a professional certified coach throughout 2022. These sessions have supported the retention and wellbeing of 28 staff members and the feedback was so positive it will now be expanded to include clinical leadership coaching to GPs in 2023.

Castleman have also invested in coaching for our Board members in recognition of the future sustainability of the company and to support with the increasing demands from the programmes of work we deliver.

Castleman Integrated Community & Primary Care Services (ICPCS) Respiratory Hub

The Castleman Respiratory Hub at St Leonards has been able to provide diagnostic spirometry and FeNO testing at a time where infection control remained a limiting factor for practices alongside a limited resource of trained workforce. Castleman cleared the backlog of patients awaiting a diagnosis that had built up during the pandemic by October 2022.

This winter saw an overwhelming peak in acute respiratory illness alongside a national outbreak of Streptococcus A, putting unprecedented pressure on general practice. In response NHSE funded additional winter support and between early January 2023 and the end of March 2023 the Castleman respiratory hub site was repurposed as an Acute Respiratory Infection Assessment Hub. This service provided 1,200 patients in our practices with an urgent face-to-face assessment, treatment and monitoring via a virtual ward as needed, keeping them at home and reducing the demand on practices and acute secondary care. This service was separately funded by NHS England and run independently by Castleman to reduce the pressures on practices for urgent appointments.

This service also provided Castleman with two funded C Reactive Protein (CRP) point of care testing machines which will be available for future use once the NHS Dorset pathway of calibration and alignment with the labs is confirmed.

The Castleman ICPCS Respiratory Specialist Nurse (RSN) has in addition supported with specialist advice and guidance for patients and education and ongoing development of practice nursing teams. This includes progressing plans for the expansion of respiratory diagnostic services now infection control guidelines permit practices to perform this again. Workforce remains a challenge with a current vacancy for a Castleman RSN.

Castleman ICPCS Services – Diabetes Services

The Castleman ICPCS Diabetes Team have continued to provide advice and guidance for complex diabetic patients as well as providing an education programme for practice nurses and community teams. In recognition of the statistics around poor control of diabetic patients in care homes, the team have targeted education of care home staff and care planning of these residents and produced guidance and service plans to support them.

Castleman ICPCS Integrated Hub & Enhanced Frailty

The ICPCS hub team, based in St Leonards, provide a personalised plan of care for patients completing a comprehensive frailty assessment to proactively address health and social care needs. This service covers both an anticipatory approach to reduce the likelihood of an acute crisis and support for those who may be referred on after an Urgent Community Response or discharge from inpatient care. In 2022, there were almost 7,000 referrals from different sources including primary care, community care and secondary care. The collaborative model of the hub continues with the additional roles provided via the PCN DES such as paramedics and Ageing Well Teams providing support.

Public Health

The Castleman contract for Public Health services was extended by another year and will run until 2024. The contracts that Castleman manage include NHS Health Checks; Long-Acting Reversible Contraception (LARC); Smoke Stop and Needle Exchange.

Castleman supported with the review of the NHS Health check process and are delighted to see the introduction of an increased payment to support the invitation process for these in 2023.

Castleman Protected Learning Time Call Handling Service

Protected Learning Time (PLT) is essential for general practice staff development, but this was put at risk upon removal of the NHS Dorset 111 telephone cover for PLT sessions this year. Castleman provided the first PLT cover session in February 2023 on behalf of all 13 Practices and was hosted at St Leonards Hospital in Ringwood allowing all practice sites to close. Dates have been scheduled for the 2023/24 to enable practices to close for essential learning.

Governance Update and Castleman Structure 2023/24

The Board is led by a team of committed and professional members of our practices including GPs and Practice and Business Managers, chaired by Dr Dominic Hennessy.

Our Chief Executive Officer, Fiona Cleary, has extensive private sector experience, as well as a background in health and other public services.

In early 2023 all our Director posts were up for re-election in February: Director of Finance & Board Secretary; Director of HR & Communications; Director of Operations and the Chair of Castleman, with the Chair overseeing governance in a shared role with the Vice Chair. To ensure that Castleman continued with their strong governance we proposed to our shareholders that the re-election of these posts will take place at the AGM in June 2023 and our terms of reference allowed these elections to be deferred. We will also ask the AGM to appoint two posts for one year so that we do not find ourselves in a position when four out of the five elected posts are due for re-election at the same time again.

The Vice Chair post will be renewed in two years and the CEO post is an employed role not an elected one.

At the time of writing this report we have included our existing Board members up until June 2023.

We are fortunate that our Company model is one that is about ensuring that the shareholder practices and PCNs are independent and their own entity and are not intertwined with the operating structures of the Federation. This allows Castleman to operate as an independent organisation whilst at the same time allowing us to continue to offer support to the practices.

There are of course challenges. We are constantly looking for ways to improve the way the Company is run and ensure it is lean to maximise any operating surplus to reinvest into practices and the Company. We have workforce challenges in that our Directors also work as practice managers or doctors, so we have recently reviewed our operational model to widen the team and take pressure off the Directors. This has seen the recruitment of an Executive Assistant to the Board and an Operational Lead role for an additional 10 hours per week. We also expanded our membership to include a Lead Nurse. This role is not electable, but inputs into the Board in an advisory capacity. We have also passed the responsibility of communications to our CEO from the Director of HR & Comms.

Castleman needs to be financially robust and to do so we need to widen our remit and look for additional contracts to keep us afloat as we do less income generating work for the PCNs. This is a sign of success with Castleman supporting the PCNs to mature and they are now embedded and working well.

The last year has been no less challenging for everyone since the Covid pandemic and general practice is facing unprecedented challenges. Action is needed to ensure that it is sustainable, and this also includes our Federation. During 2022/23 we have taken the time to consider what we need as a business to be sustainable and where we feel we should be heading in the next five years. The Board spent some time in early 2022 looking at our internal governance, our purpose, values and mission and this work has extended into the coming financial year.

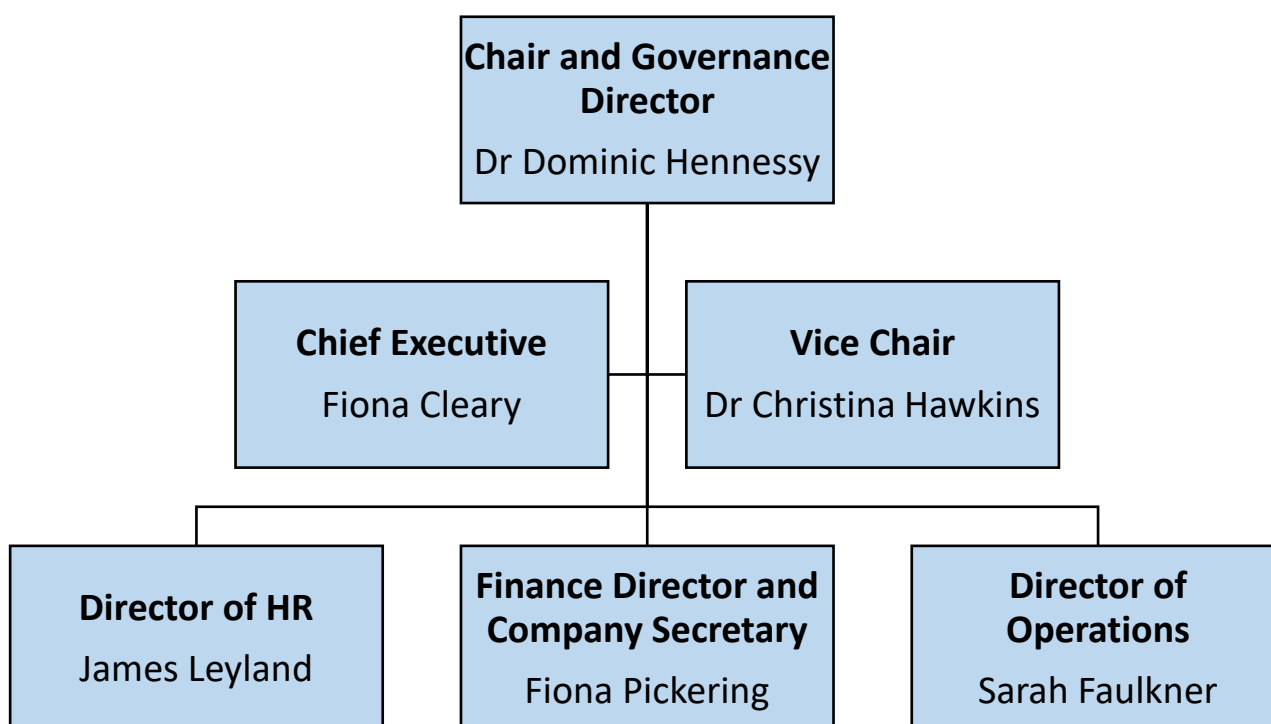
In 2022/23 we changed the way we engage with our PCN Clinical Directors to enhance clinical input and intelligence to our Board, and we do this via our Primary Care Advisory Committee (PAC). This has created greater opportunities for collaboration and shared understanding, and we consulted with the Clinical Directors on our operational plan for 2023/24.

We have invested in our Directors and continued to provide leadership coaching to the Board and changed the Director's terms of engagement to a salaried model of employment. This allows us to ensure accountability and productivity against a formal job description and annual appraisal, as is expected for a mature company.

We have in place governance structures, policies and procedures that comply with best practice. The Board continues to work hard to make the Company and its governance safe, compliant and fit for purpose.

Looking to next year, we are sure there will be additional challenges and opportunities for Castleman, and we are confident that our work this year has provided a more robust structure and purpose to meet them. We look forward to sharing our continued successes with you.

Organisation Structure



- Responsibility for Communications Chief Executive
- Operations Lead Part Time
- Executive Assistant Full Time
- Lead Nurse Part Time

Communication and Engagement 2023/24

We place great importance on prioritising effective communication and engagement with our practices, PCNs, clients, commissioners, stakeholders and the wider health community. We always work hard to communicate in an open, trustworthy, accessible and responsive way and continue to place communications at the heart of our strategy development.

We provide updates via communication channels such as Board update emails to shareholders, via our website and stakeholder newsletters.

We have updated our website to reflect our activity and to promote our work to a wider audience.

We continue to represent our practices and Castleman in discussions at local, regional and sometimes at a national level, so their views are considered when decisions are made that will impact their work or the care of their patients. For example, we represent general practice in the discussions with the Alliance as a Federation and also continue to provide additional support to by chairing the Dorset PCN Business Managers meetings.

We also strive to listen to as many voices as possible, particularly when it comes to the way we interact and do business. We will always take the opportunity to proactively seek feedback through our communications and we use this to inform improvements in the way we do business.

Castleman meets regularly with the PCN Clinical Directors and Network Business Managers via our Primary Care Advisory Committee to discuss how we can continue to support the needs of the PCNs and individual practices which are the backbone of our shared business. We have also reformed our Delivery Group Meetings inviting all Practice and Business Managers from our Shareholder practices.

We always try to match the channels of communication we choose to the engagement preferences of different stakeholder groups and welcome suggestions from others on this.

Finance Update

2022/23 has been another successful year for Castleman Healthcare. Despite the significant investment in services such as ICPCS, our wellbeing offer and locum support payments to practices (totalling over £130,000) we are still pleased to report a significant profit at year end. We carried forward profit from 2021/22 which put us in a good position to continue delivering services. The profit reported at the end of this financial year means we have been able to make the decision to cease charging PCNs for our ongoing support.

Our profit from the 2021/22 meant that we were able to increase the Chief Executive's role to full time and are pleased to report that this will continue into the 2023/24 financial year.

The move to a year end of March has aligned us with the NHS contracting year which has made financial forecasting easier. With all practices expected to move to a March year end from 2024/25 onwards this will provide unity across the Company and its shareholders.

Turnover was more in 2022/23 (in excess of £1.8 million) in comparison to 2021/22 (in excess of £1.3 million), this is due to the activity levels of the Public Health contracts increasing since the pandemic and the income generated by managing the ARIA Hub and the Alliance contract.

Expenditure has increased however, in part due to the formalisation of the Director contracts and pay structure, the employment of an Operations Lead and full time Executive Assistant along with the significant investment in ICPCS services. In addition, Castleman invested in wellbeing support activities for both staff and patients (such as the DorPip service provided to new parents and babies).

For 2023/24 we plan to invest in our respiratory services along with an increased offer of wellbeing support to practices in the form of professional coaching sessions offered to Partners.

HR Update

Although 2022/23 has seen some challenges recruiting staff to deliver services to our patients our nursing team continues to work hard to deliver services.

Our diabetes team now includes two specialist nurses, delivering expert training to practice nurse teams and specialist input to complex diabetes patients. The team have developed an education plan and guidance document and intend to deliver training for Care Home teams with the aim to reduce the demands of diabetic patients on practice teams. This pilot will commence in the summer of 2023 and, if successful, will be rolled out across all care homes in each PCN.

Our respiratory team has a vacancy for an additional nurse at the time of this Annual Report. However, the respiratory team was aided by additional staff on secondment from practices and locums to be able to deliver the ARIA Hub service at St Leonards and was mobilised at short notice after an NHS England prioritised support for respiratory illnesses are part of the winter pressures approach.

We have extended the HCA hours to support both the diabetes and respiratory teams. We have a GP at the East Dorset Integrated hub who continues to support our frailty service and we are recruiting an additional GP post to support the Alderney Hub in Poole.

We have recruited a Castleman Lead Nurse to support, clinically, the Castleman nurse-led services. This role also provides additional supervision for our PCNs' Social Prescribers.

Dr Christina Hawkins has filled the Vice Chair role.

We have also recruited a full time Executive Assistant to provide administrative support to the Castleman Directors. The workload for delivering services increases and this role will support the Directors so they can concentrate on additional income generating ventures.

Our Practices

Network Poole North PCN	
Canford Heath Group Practice	9 Mitchell Road, Canford Heath, Poole, Dorset, BH17 8UE
Harvey Practice	18 Kirkway, Broadstone, Dorset, BH18 8EE
Hadleigh Practice	Hadleigh House, 20 Kirkway, Broadstone, Dorset, BH18 8EE
Birchwood Medical Centre	The Birchwood Medical Centre, Northmead Drive, Creekmoor, Poole, Dorset, BH17 7XW
Wimborne & Ferndown PCN	
Walford Mill Medical Centre	Walford Mill Medical Centre, Knobcrook Road, Wimborne, Dorset, BH21 1NL
The Old Dispensary	32 East Borough, Wimborne, Dorset, BH21 1PL
Quarter Jack Surgery	Rodways Corner, Wimborne, Dorset, BH21 1AP
Penny's Hill Practice	St Mary's Road, Ferndown, Dorset, BH22 9HB
Orchid House Surgery	St Mary's Road, Ferndown, Dorset, BH22 9HF
Crane Valley PCN	
Barcellos Family Practice	Corbin Avenue, Ferndown, Dorset, BH22 8AZ
West Moors Group Practice	175 Station Road, West Moors, Ferndown, Dorset, BH22 0HX
Cranborne Practice	The Surgery, Penny's Lane, Cranborne, Wimborne, BH21 5QE
Verwood Surgery	15 Station Road, Verwood, Dorset, BH31 7PY



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