Independent Healthcare Providers Network

State of the sector 2021

IHPN industry barometer

IN PARTNERSHIP WITH

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Contents

Executive summary

I'm delighted to launch our second annual IHPN Industry Barometer: State of the Sector report.

The Barometer provides a snapshot of how senior leaders across the independent healthcare sector feel about all their key markets and the issues affecting their business.

Overall, it's clear that independent healthcare providers are continuing to adjust to living in a world with covid19 - the impact of which is being felt particularly in terms of workforce pressures. However, the results reflected in this barometer undoubtedly show an industry that is expecting strong growth across the majority of its key markets, most notably around domestic self-pay and PMI.

Indeed, while the health service's recovery from the pandemic is unlikely to be swift, there is clearly real appetite from independent healthcare providers to play their full role in getting the health system back on track. The barometer shows that relationships with the NHS are continuing to improve and despite some concerns around the development of new Integrated Care Systems, overall the message seems to be "help us, help you" to recover from the pandemic.

What is also very clear from the barometer are the real concerns the sector has around being able to sustainably recruit and retain their staff - not helped by current issues around self-isolation and other covid related factors. This is of course a global issue and IHPN has established a new HR Expert Advisory Group which will take a strategic look at the workforce issues facing the sector and help support our members in securing the staff they need.

And more broadly given the scale of the challenge, we will continue to push for more system wide, collaborative solutions to the workforce crisis which reflect the need to address these issues in both the NHS and independent sector.

We have been fortunate to have once again worked in partnership on the Industry Barometer with Practicus, whose purpose is to help organisations and people navigate change, and we thank them for the experience and insight they have brought to this project.

We will be running the Barometer each year and so over time we can gain further insights from members and even better support them across all their key markets. Thank you again to all our members who contributed to the survey and hope that you find the results interesting.

David Hare, Chief Executive, IHPN

PRACTICUS™ Navigating change with insight

The pandemic has given rise to a number of foundational shifts in healthcare that will likely be sustained in the longer term. These include the rapid adoption of digital innovations; greater use of data sharing and analytics; and deeper public-private collaborations in sharing much-needed capacity.

Indeed, there is real impetus within the NHS to build on the high levels of collaboration achieved during the pandemic and this offers fresh opportunities for independent providers who are able to transform quickly. How they understand, and respond to these issues will shape their ability to navigate from "recovering" to "thriving" in the post-pandemic era.

> **Navigating change and managing the myriad of challenges ahead remains a shared industry problem. As a leading change partner, we are keen to help facilitate.**

Some responses to this year's IHPN barometer indicate that a key part of the solution to the nation's healthcare challenges is to maximise the use of the independent sector, and bring them to the table early when planning developments at ICS level. To echo the words of David Hare in May this year, an "all shoulders to the wheel" approach, is needed to help the reset and recovery.

Navigating change and managing the myriad of challenges ahead remains a shared industry problem. As a leading change partner with nearly two decades experience in supporting the Independent Healthcare sector, (as well as the NHS), we are keen to help facilitate.

We are therefore delighted to be working with IHPN again this year, to create roundtable discussions that brings together diverse thinking around today's key challenges. We hope you will be able to join us.

By Andrew Vaux
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About Practicus

Through our community of experts, from inside and outside the sector, Practicus have the depth and breadth of experience and hindsight to deliver your foresight. We make access to our community freely and confidentially available to help our clients tackle their most intractable problems with experience. Our experts deliver transformation and change, run project workstreams or act as a neutral, yet insightful, sounding board.

Click here for more about Practicus

Results: The impact of the coronavirus pandemic

How large an impact does the pandemic continue to have on your organisation?

4% believe covid19 has had an extremely significant impact on their organisation

46% believe covid19 has had a very significant impact on their organisation

38% believe covid19 has had a somewhat significant impact on their organisation

12% believe covid19 has had a not-so significant impact on their organisation

Although the pandemic continues to have a substantial impact on independent healthcare organisations, that impact is gradually receding. The vast majority **(88%)** of respondents feel that covid19 continues to have a significant impact on their organisation, down from **96%** last year, with **50%** of respondents feeling the impact was either extremely significant or very significant.

> "Workforce challenges are key - covid self-isolation, absences, tiredness..."

50%

have felt covid19 has had a very or extremely significant impact on their organisation

How significant are the changes you have made to your business since the onset of covid19?

19% feel an extremely significant impact

42% feel a very significant impact

27% feel a somewhat significant impact

12% feel a not-so significant impact

> "We have started to provide a broader range of services to support the NHS"

Respondents have had to make significant changes to their business since the onset of covid19, with **19%** feeling the impact has been extremely significant, and a further **69%** feeling it was either very significant or somewhat significant. Interestingly, these results are almost identical to the question asked last year and demonstrates the nimbleness and agility of the sector and their ability to quickly adapt to new operating environments. This includes through redesigning patient pathways, with a focus on more digital provision, and offering a broader range of services to the NHS to meet local need.

Results: The impact of covid19

What do you consider to be the main implications of covid19 in relation to your operation - rank in order of impact?

Respondents have a relatively consistent view of the main implications of covid19 in relation to their operation. Over half of all respondents rank the reduced availability of staff to deliver services in their top 3 – a concern which wasn't as apparent in 2020. In addition, just under half of all respondents rank highly the impact of social distancing and increased infection control requirements on operating practices and efficiencies, and increased demand for private care.

What do you consider to be the main implications of covid19 in relation to your workforce - rank in order of impact?

Respondents feel strongly that the main implications of covid19 in relation to their workforce is burnout of staff alongside increased mental health issues. In addition, most respondents rank managing higher levels of staff vacancies due to sickness, quarantine and shielding in their top 3. Respondents also feel that changing attitudes to home working and changing attitudes to work/life balance are having a major impact.

To what extent do you feel your organisation is a key part of the Covid recovery in local healthcare systems?

> **"We are playing a key role in the healthcare recovery locally and could do even more to support"**

12% believe their organisation is an extremely significant part of the recovery

38% believe their organisation is a very significant part of the recovery

27% believe their organisation is a somewhat significant part of the recovery

19% believe their organisation is a not so significant part of the recovery

4% believe their organisation is a completely insignificant part of the recovery

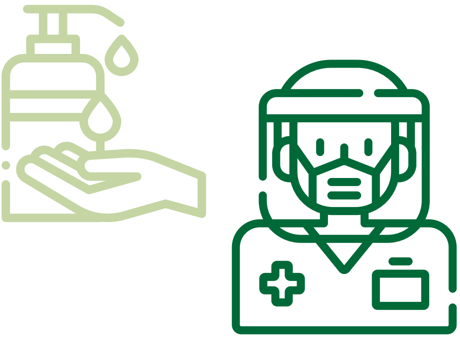
This is a new question for 2021 and aims to understand whether respondents feel they are involved in decisions made in the local area that they provide services in, whether at CCG or (increasingly) ICS level. This is particularly important in relation to recovery given the growing backlog of treatment and the need for local areas to use all available capacity to ensure patients get the care they need. Positively, the survey shows that **77%** of respondents feel that their organisation is a key party of the covid recovery in local healthcare systems. Less than one quarter **(23%)** feel they are either not significant or insignificant in their local healthcare recovery.

Summary: The impact of covid19

What does this section tell us?

What overwhelmingly comes through in the answers to this section is the scale of the continued impact that covid19 has had on providers. Last year, providers felt that the impact of covid would continue throughout 2021 and beyond – and this is exactly what is borne out in this year's set of responses. However, there is acknowledgement that those initial impacts of the pandemic are starting to recede.

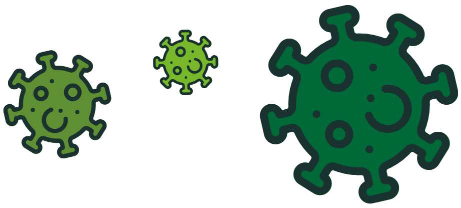
Providers are therefore continuing to make wholesale changes to their business, particularly with regards the ongoing need for social distancing and increased infection control requirements, with the self isolation of staff creating a significant operational challenge for the sector.



Covid has clearly had a real impact on the independent healthcare workforce, with particular concern around staff burnout and growing mental health issues. In addition, providers have realised that covid has changed attitudes to both homeworking and what a positive work/life balance looks like, and this is continuing to influence working practices.

Ensuring independent providers can both continue to support their staff to work safely and adapt to the "new normal" ways of working has been a key priority for IHPN's HR Directors forum in the past year and our Clinical workstream continues to liaise with NHSE-I on key safety issues to ensure the sector's staff are fully factored into changing in working practices. This has included working with NHS England on staff passports and facilitating sessions on both "Job Crafting" and the hybrid working model.

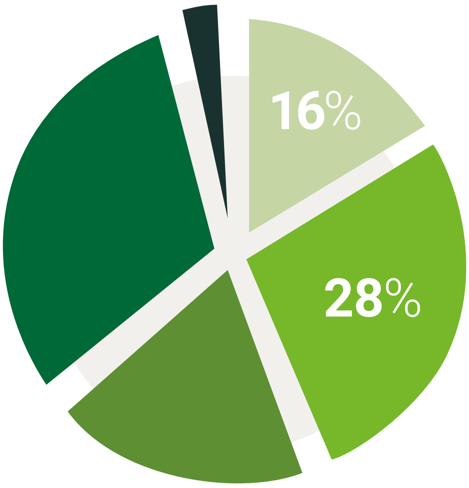
Given that NHS/independent sector partnerships were a key feature of the health system's response to covid, it is not unsurprising that providers broadly feel they have a key role in the recovery of local healthcare systems. However, there's undoubtedly appetite amongst independent providers to make an even greater contribution to the covid recovery and play a key part in emerging Integrated Care Systems.



Results: Market environment

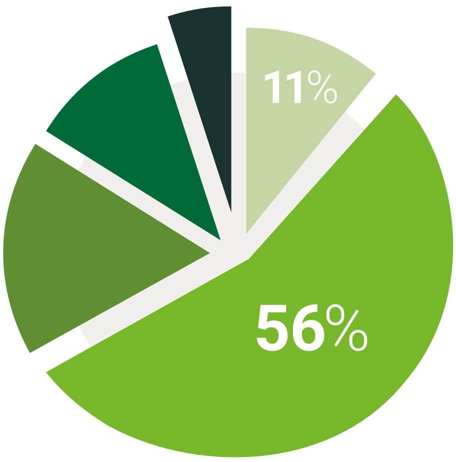
How would you describe the market environment for the provision of NHS funded services?

- **16%** feel the market is very positive
- **28%** feel the market is positive
- **20%** feel it is neither positive nor negative
- **32%** feel the market is negative
- **4%** feel the market is very negative



How would you describe the market environment for the provision of PMI funded services?

- **11%** feel the market is very positive
- **56%** feel the market is positive
- **17%** feel it is neither positive nor negative
- **11%** feel the market is negative
- **5%** feel the market is very negative



> **Covid19 has improved our relationships with local Trusts… Some great positive conversations and appetite to work with us**

> **A very small amount of our work is linked to PMI but we have seen a growth is this area**

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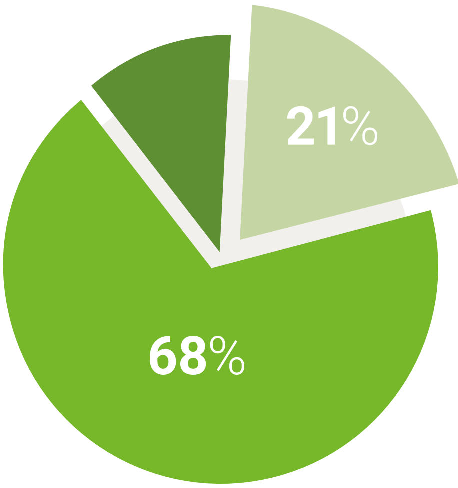
Results: Market environment

How would you describe the market environment for the provision of domestic self pay services?

- **21%** feel the market is very positive
- **68%** feel the market is positive
- **11%** feel it is neither positive nor negative

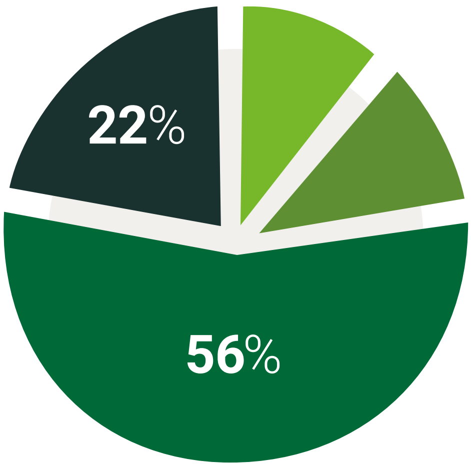


The four charts show that respondents feel most positively about the domestic self-pay market with **89%** viewing it very positively or positively. This is followed by PMI funded services being viewed positively by **67%**, NHS funded services at **44%**, and international self-pay market down at **11%**.

Respondent comments suggest that the high levels of growth expected around the domestic self-pay market is fuelled by the large NHS waiting lists for elective care. Similarly, when it comes to the PMI funded market, comments from respondents indicate that this is an area that offers real potential growth, alongside continuing support for the NHS to clear the backlog.

How would you describe the market environment for the provision of international self pay services?

- **11%** feel the market is positive
- **11%** feel it is neither positive nor negative
- **56%** feel the market is negative
- **22%** feel the market is very negative



In terms of the provision of NHS funded services, this appears to be influenced by a challenging operational environment and highly variable experiences with local commissioners.

With regards the international self-pay markets, the negative outlook from this market has, unsurprisingly, been influenced by travel restrictions imposed due to covid19.

Results: Market environment

Where do you see the greatest opportunities for growth in private pay over the next 5 years?

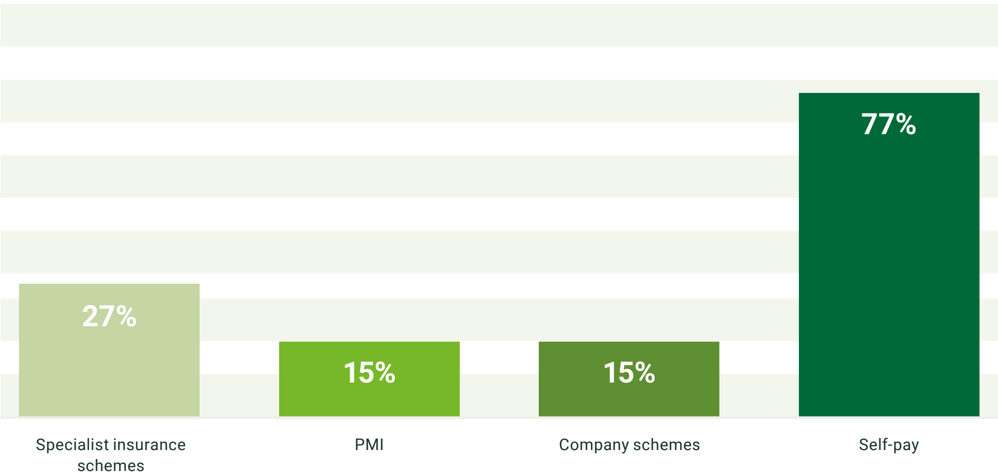
77% feel there is opportunity for growth in self-pay

15% feel there is opportunity for growth in company schemes

15% feel there is opportunity for growth in PMI

27% feel there is opportunity for growth in specialist insurance schemes

77% of respondents feel that self-pay represents a key opportunity for growth - which is a substantial increase from 2020 and reflects the sentiment of answers in the previous questions. NB Respondents were able to pick more than one option for this question.



> **We are launching a remote concierge service to help care for elderly people to stay safe in their homes.**

> **Patients are willing to pay to be seen faster**

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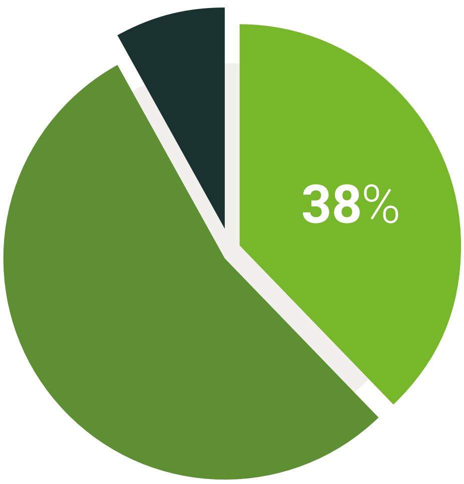
Results: Market environment

How would you describe the current government's attitude to the independent health sector?

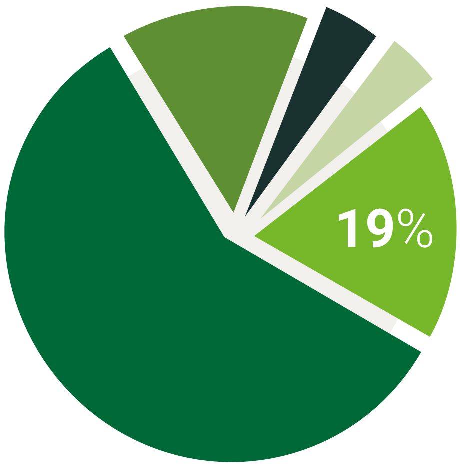
- **38%** feel the market is positive
- **54%** feel it is neither positive nor negative
- **8%** feel the market is negative



> **NHS leadership is changing and the legislation is also changing – we'll know more over next 6-12 months**

How would you describe the NHS leadership's attitude to the independent health sector?

- **4%** feel the market is very positive
- **19%** feel the market is positive
- **58%** feel it is neither positive nor negative
- **15%** feel the market is negative
- **4%** feel the market is very negative



> **With a new appointee moving from COO to CEO, time will tell… this will be driven by the funding round and the settlement from the Treasury**

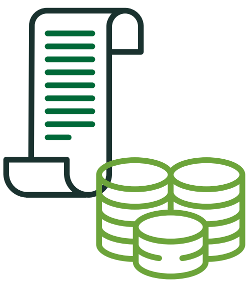
Respondents do feel slightly more positively about the Government's attitude towards the independent health sector then they do towards NHS's leadership, but what comes across most is the uncertainty that many respondents feel about relations going forward. Comments suggest that this stems from a number of places including the impact of the move towards Integrated Care Systems and the changes set out in the Health and Care Bill, as well as what the appointment of the new chief executive at NHS England will mean for the sector.

Summary: Market environment

What does this section tell us?

These results show that providers are reasonably bullish about all markets with the exception of international self-pay. Covid19 and the continuing restrictions on international travel have obviously limited providers' ability to grow their customer base in this area.

Providers are clearly most positive about the domestic self-pay market, and there is great confidence here around growth in this area. And in response to growing patient demand for private healthcare, IHPN are developing a programme of work around this, including working with the Patients Association to develop resources for the public on how independent healthcare works and ensure they are aware of all the choices available to them.

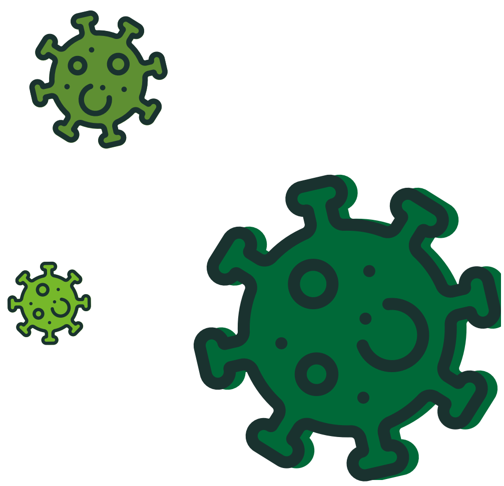


In addition, providers feel that they will continue to play an increasing role in delivering both NHS and PMI funded services. However, comments suggest that this may, in time, create tension in balancing the need to meet all the pent-up demand from their different markets.

Although the survey results suggest that progress has been made in fostering new and fruitful relations with both the NHS and government, there exists real caution over how these will develop in the coming year. This is influenced by the current Health and Care Bill and move towards more integrated systems of care, as well as the change in leadership at the top of the office in NHS England.

To help support the sector and ensure the positive NHS/independent partnerships developed during the pandemic can continue to thrive, IHPN has been prioritising building our relations with the NHS leadership and those in Government, particularly those in the NHS Elective Care Recovery Team.

And more broadly IHPN are also continuing our work around influencing emerging NHS integrated care systems and ensuring independent providers are fully factored into their plans. IHPN are currently working with ICS leaders, via the NHS Confederation ICS Network, to support their effective engagement with non-NHS partners, so that NHS patients can benefit from the high-quality care provided by the independent sector.



Results: The NHS

The NHS is developing more integrated systems of care - to what extent do you feel part of your local system?

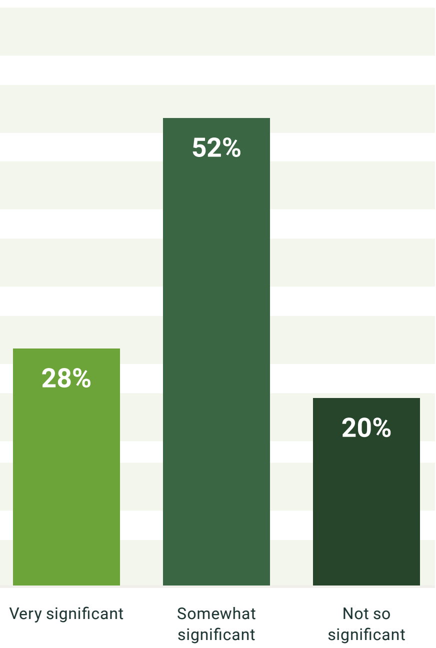
4% feel completely part of the local system

40% feel involved in part

56% don't feel part of the local system

With integrated care systems working to establish themselves at the same time as NHS organisations are continuing to deal with the impact of covid, it is not unsurprising that independent healthcare providers are finding it challenging to engage with ICSs. Indeed, less than half of all respondents feel part of their local system and only **4%** feel completely involved. While it is perhaps too early to draw many conclusions on how ICSs will work with the independent sector in the longer term, it is also striking that **56%** of respondents do not feel part of the local system at all. This is in-spite of other questions showing many in the sector feel they are continuing to build positive relationships with the NHS locally. We do know, however, that these concerns and uncertainties are felt by non-NHS organisations more broadly at a local level – including those in the voluntary and social enterprise sector - as more integrated systems of care are formed.

> **It varies across geography… on the whole we are building good relationships**



What impact do you think the current Health and Care Bill will have on your business?

- **28%** feel it will have a very significant impact
- **52%** feel it will have a somewhat significant impact
- **20%** feel it will have a not so significant impact

The reforms set out in the new Health and Care Bill represent the biggest changes in a decade to how NHS services are commissioned and organised. This is reflected in the survey with **80%** of respondents feeling that the Bill will have a significant impact on their business and notably the commissioning landscape, with concerns it could be used to exclude independent providers locally. With the Bill currently going through Parliament, for many in the sector, it's not yet clear what impact this new legislation will have. Therefore it's possible the impact of the Bill may feature more heavily next year once it has passed into law.

Results: The NHS

Has your relationship changed with NHS organisations in your local area in the past year? If you operate in multiple areas, then please give your general view?

36% relationships have improved

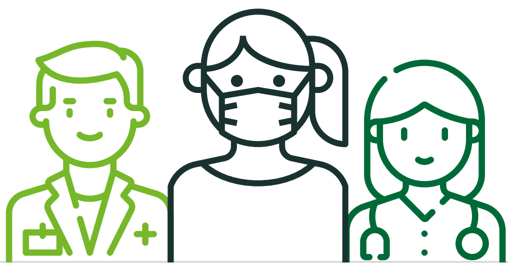
4% relationships have deteriorated

52% a real mixed bag - some better, some worse

8% no change to relationships

Over one third **(36%)** of respondents feel that their relationships have improved with NHS organisations in their local area in the past year, with only a very small percentage **(4%)** feeling that relationships have deteriorated. Most critically, over half of respondents have experienced a mixed bag with some relationships improving and others worsening – this reflects anecdotal feedback received by IHPN from members over the year and is a similar picture to the results in 2020.

36% **of respondents feel that relationships have improved with NHS organisations**



What will be the principal driver of commissioner behaviour over the next few years?

20% response to the Coronavirus pandemic

36% pressure to achieve savings

24% response to central NHS policy

8% response to NHS legislation

4% no change to relationships

8% no change to relationships

Respondents feel there will be three main drivers of commissioner behaviour over the next few years - the pressure to achieve savings will be the principal driver followed by response to central NHS policy, and then the wider response to the coronavirus pandemic. However, there is also a real sense that providers feel that the relationships that were built up during 2020 are already being eroded in some areas and will negatively impact on commissioner behaviour.

> **"Relationships with commissioners improved greatly during the pandemic but are already eroding considerably in many areas. Both parties need to work harder to maintain them"**

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Summary: The NHS

What does this section tell us?

The NHS is currently undergoing a period of great change, hot on the foot of 18 months of dealing with the first global pandemic in a century. The emergence of 42 new integrated care systems and the wider changes in the Health and Care Bill represent the biggest changes around how NHS services are commissioned and organised in a decade - all against a backdrop of a growing backlog of treatment. And in addition, the NHS has just appointed a new Chief Executive where time will tell how she intends to lead and her approach to the sector.

This uncertainty is reflected in the survey, and providers have a range of views about how integrated systems of care and the new Health and Care Bill will influence the sector. Prior to the pandemic, providers had concerns about the development of integrated care systems, particularly that they may reduce the range and variety of providers being commissioned to deliver services in local areas. It is interesting that despite the development of new NHS/ independent sector partnerships during 2020, over half of respondents still don't feel part of their local system, with significant concerns around future commissioning. Feedback that IHPN has received from members over the past year is reflected in the survey with over half of respondents experiencing a mixed bag with some NHS relationships improving and others worsening. This, in part, recognises the high levels of variation in CCG behaviour that members have experienced over the last 12 months. And against a backdrop of providers seeing real growth in demand for privately funded services, it is easy to see a tension emerging between balancing both their NHS and private markets.

Despite this uncertainty, we still see a positive picture overall. More than one third of members feel that relationships between providers and NHS organisations in their local area has seen an improvement and in the longer term this should put providers in good stead to be able to support commissioners to respond effectively to challenges post covid.

Results: Quality, safety and workforce

What has made the biggest impact in the past 12 months in relation to quality and safety in your organisation?

8% promotion of a just culture (duty of candour and freedom to speak up)

44% workforce training and development

12% Improved partnership working with the NHS

24% Information, briefings and meetings produced and organised by IHPN

12% Other

Respondents feel that workforce training and development has had the biggest impact in relation to improving quality and safety in the independent health sector over the past 12 months. This is followed by the support that is provided by IHPN through briefings, meetings and activities focused around creating open cultures.

> **We have a better shared understanding around medical governance and this is good news**

84%

view workforce challenges as the top priority for their organisation

What do you see having the biggest impact in the next 12 months in relation to quality and safety in your organisation?

8% the Medical Practitioners Assurance Framework (MPAF)

16% promotion of a just culture (duty of candour and freedom to speak up)

48% workforce training and development

16% Improved partnership working with the NHS

12% Information, briefings and meetings produced and organised by IHPN

Looking forward to the next 12 months, respondents feel that workforce training and development will continue to have the most significant impact in relation to quality and safety. This is followed by promotion of a just culture and improved partnership working with the NHS. Support provided by IHPN through briefings and meetings will continue to play a role in promoting safety and quality, and more broadly we will be developing an overarching programme of work around patient safety and quality to build on what has been achieved through the MPAF.

Results: Quality, safety and workforce

What is the main challenge you face in relation to recruitment?

> There are just not enough experienced clinicians out there

> We're all looking for the same talent in a small pool

> Challenging to offer competitive packages compared to NHS statutory bodies

> The more specialist the role, the harder to recruit

Respondents answered this question consistently with two key areas emerging. The challenges around recruitment rest on both general availability of staff but also more specifically on being able to recruit people with the right quality and skills. This appears to be a particular issue with nurses and other specialist roles such as anaesthetists and radiographers.

Secondly, respondents highlight that the attractiveness of NHS terms and conditions can deter staff from working in the private sector. This mirrors the results from the 2020 survey.

What is the main challenge you face in relation to retention?

Interestingly respondents feel that the increased competition for staff, fuelled by the shortages mentioned in the previous question, is understandably affecting retention. Respondents feel that competition around salary levels is particularly an issue here.

> Ability to match NHS pension and sickness pay

> There is a small pool of very talented and valuable employees who will look for more a work life balance - the question is how can this be achieved against a backdrop of asking for more productivity linked to backlogs

> Current employee mental health issues triggered by the pandemic

> Work life balance expectations have changed and resilience has been affected by the pandemic

Results: Quality, safety and workforce

What is the main challenge you face in building resilience of your workforce?

Again, respondents feel that staff shortages will have a direct impact on being able to manage staff resilience, which will only be made worse by the fact that many staff are already feeling "burnt out" from working during the pandemic. Furthermore, the emerging mental health issues amongst many of the workforce is leading to real concerns around the resilience of the workforce.

"Ability to recruit and train at pace in line with the increased activity

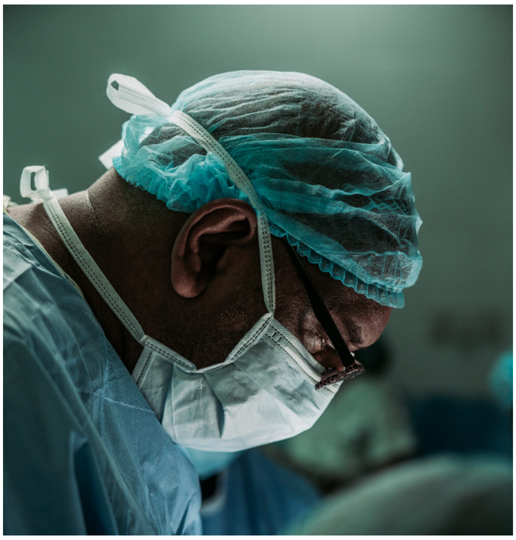
Headspace for people to talk about and act on such issues

Burn out post pandemic and people changing careers

Consistency of workflows - too few patients in clinics/lists is as bad for morale as too many

Offering work life balance with a small work force and with recruitment issues

Vacancies meaning people are stretched"



Results: Quality, safety and workforce

How are you planning to resolve the three workforce challenges of recruitment, retention and resilience?

65% Grow your own (apprenticeships, training and development)

22% Service reconfiguration

22% Merging role boundaries

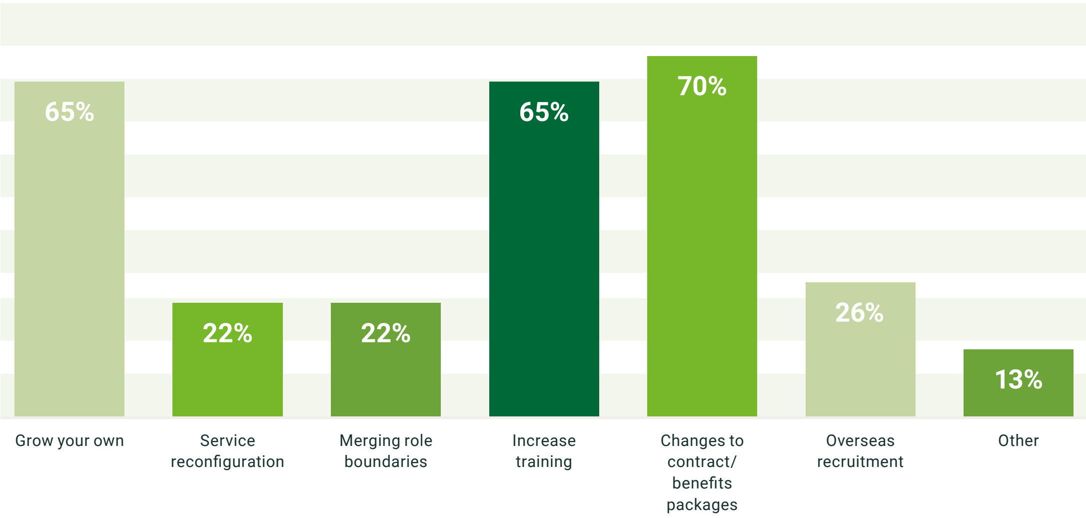
65% Increase training

70% Changes to contract/benefits packages

26% Overseas recruitment

13% Other

Respondents feel there are three main ways to resolve these workforce challenges – growing their own through apprenticeships, training and development; increase training; and changes to contract/benefits packages. NB Respondents were able to pick more than one option for this question.

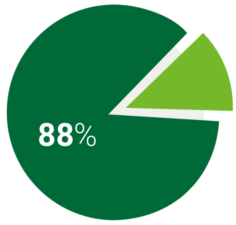


> **We hope to make our existing workforce more diverse in terms of clinical competencies to meet service flows**

> **We need both interim and longer term solutions to this problem**

Results: Quality, safety and workforce

What are your organisation's aspirations in terms of training clinical staff over the next 5 years?



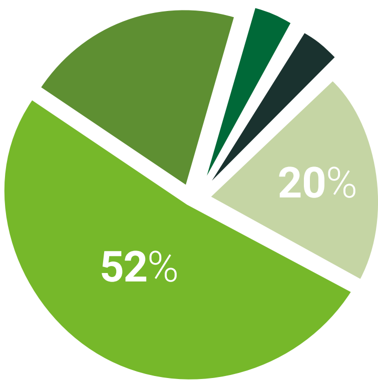
88% would expect training to increase

12% would expect training to stay at about the same levels as now

0% would expect training levels to decrease

The overwhelming majority of respondents **(88%)** expect the training of clinical staff to increase with a further **12%** expecting it to stay at similar levels to now. This is an increase from 2020 and recognises one of the ways that providers can not only retain staff but also build resilience over the coming months/years.

What are your feelings about increasing the number of apprenticeships in your organisation?



- **20%** feel very positive
- **52%** feel positive
- **20%** feel neither positive nor negative
- **4%** feel negative
- **4%** feel very negative

Almost three quarters **(72%)** of respondents are very positive or positive about increasing the number of apprenticeships in their organisation. While a slight drop from last year at **88%**, this still reflects the key role that apprenticeships play in member organisations, despite the fact that some members feel the current apprenticeship scheme has some limitations.

> **We have launched a very substantial scheme for nurses and will do more in this area and others over time**

Summary: Quality, safety and workforce

What does this section tell us?

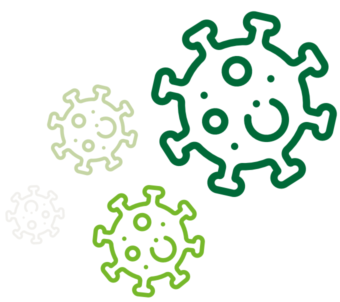
These survey results demonstrate just how acute the workforce challenges are facing the independent sector (and indeed the broader healthcare system). Staffing issues associated with the pandemic such as staff sickness, quarantine and shielding are still being felt and have added to the longer term challenges around recruitment and retention. In addition, the emerging challenge of increasing mental health concerns and burnout amongst staff is all creating a "perfect storm."

Given the scale of these challenges, IHPN have recently set up an HR Expert Advisory Group to take a strategic look at the workforce issues facing the sector, and to develop a work programme to support providers to better recruit and retain staff. More broadly given the scale of the challenge, IHPN will continue to push for more system wide, collaborative solutions to the workforce crisis which reflect the need to address these issues across all healthcare providers.

In addition, we are also looking at innovative new ways we can support the sector to access specialist clinicians, including nurses, anaesthetists, and radiographers. Brexit and continued covid restrictions on travel have of course impacted on the ability to recruit highly skilled workers from overseas, and IHPN have therefore welcomed the opportunity to work with Talent Beyond Boundaries in the last year - an organisation which specialises in helping displaced and refugee clinicians find employment. The learning from this pilot activity with IHPN members will be useful in sharing best practice across the sector.

As is clear from the barometer results, independent providers expect to be delivering an increased amount of training over the next 5 years given the challenges around the recruitment and retention of staff. Indeed, the independent health sector has been expanding its endeavours in this areas, including through nursing associates and apprenticeships schemes, as well as clinical placements for other professionals such as physiotherapists, radiographers and Doctors in Training (DiT) support. Since the onset of the pandemic, over 2,000 NHS junior doctors have already undertaken their training in independent facilities and we hope this number will rise in the coming year, with IHPN continuing to work both with Health Education England and members to further extend these activities.

More broadly on safety and quality, IHPN is recruiting for a new Head of Patient Safety and Quality who will support members on this agenda – including helping to spread learning and best practice across the sector as well as restarting our work on our MPAF implementation programme.



Looking forward

If you could change one thing to benefit your business, what would it be?

Providers identified a myriad of changes that would benefit their businesses, but some key themes emerged. Firstly, that a clear strategy and policy direction for the entire healthcare system would be extremely beneficial. Providers suggest this starts at the top with a clear government strategy on healthcare which address both the short and long term challenges facing the system, and which both acknowledges and supports the role independent providers have in delivering high quality service provision to both NHS and private patients.

Secondly, members want to see independent providers involved in new integrated care systems at all levels so that they can play their part and bring their experience to the fore. Systems therefore need to be open and transparent for effective and productive relationships to exist.

Thirdly, members set out the need for high quality, consistent and effective commissioning which ensures the best outcomes for patients as well as value for the public purse. Linked to this is the desire for more sophisticated funding mechanisms that underpin these commissioned arrangements and that fully reflect the true costs of operation in the post-covid environment.

Finally, the 2021 Barometer has highlighted the size of the workforce challenges that providers are experiencing. Although this was an issue last year, the combination of the pandemic and Brexit has seen this issue balloon. This is a shared problem that providers across the whole health and care system share and as a result members want to see collaborative, whole system solutions to this issue.

> **Collaboration around staff recruitment rather than competition!**

> **Longer term contracting with the NHS to enable us to confidently invest in our business**

Independent Healthcare Providers Network

The Independent Healthcare Providers Network (IHPN) is the representative body for independent sector healthcare providers. Our members deliver a very diverse range of services to NHS and private patients including acute care, primary care, community care, clinical home healthcare, diagnostics and dentistry.

To learn more about this document and about IHPN, please contact us.

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