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**[paste trust logo here]**

**Strategic Plan Document for 2014-19**

**[insert name] NHS Foundation Trust**

**Strategic Plan Guidance – Annual Plan Review 2014/15**

The cover sheet and following pages constitute the strategic plan submission which forms part of Monitor’s 2014/15 Annual Plan Review.

The strategic plan must cover the five year period for 2014/15 to 2018/19. Guidance and detailed requirements on the completion of this section of the template are outlined in Section 5 of the APR guidance.

Annual plan review 2014/15 guidance is available [here](http://www.monitor.gov.uk/node/5502).

Timescales for the two-stage APR process are set out below. These timescales are aligned to those of NHS England and the NHS Trust Development Authority which will enable strategic and operational plans to be aligned within each unit of planning before they are submitted.

Monitor expects that a good strategic plan should cover (but not necessary be limited to) the following areas, in separate sections:

1. Declaration of sustainability
2. Market analysis and context
3. Risk to sustainability and strategic options
4. Strategic plans
5. Appendices (including commercial or other confidential matters)

As a guide, we would expect strategic plans to be a maximum of fifty pages in length.

As a separate submission foundation trusts must submit a publishable summary. While the content is at the foundation trust’s discretion this must be consistent with this document and covers as a minimum a summary of the market analysis and context, strategic options, plans and supporting initiatives and an overview of the financial projections.

Please note that this guidance is not prescriptive. Foundation trusts should make their own judgement about the content of each section.

The expected delivery timetable is as follows:

|  |  |
| --- | --- |
| Expected that contracts signed by this date | 28 February 2014 |
| Submission of operational plans to Monitor | 4 April 2014 |
| Monitor review of operational plans | April- May 2014 |
| Operational plan feedback date | May 2014 |
| Submission of strategic plans  (Years one and two of the five year plan will be fixed per the final plan submitted on 4 April 2014) | 30 June 2014 |
| Monitor review of strategic plans | July-September 2014 |
| Strategic plan feedback date | October 2014 |

## Strategic Plan for y/e 31 March 2015 to 2019

**This document completed by (and Monitor queries to be directed to):**

|  |  |
| --- | --- |
| Name |  |
|  |  |
| **Job Title** |  |
|  |  |
| **e-mail address** |  |
|  |  |
| **Tel. no. for contact** |  |
|  |  |
| **Date** |  |

**The attached Strategic Plan is intended to reflect the Trust’s business plan over the next five years. Information included herein should accurately reflect the strategic and operational plans agreed by the Trust Board.**

**In signing below, the Trust is confirming that:**

* **The Strategic Plan is an accurate reflection of the current shared vision and strategy of the Trust Board having had regard to the views of the Council of Governors;**
* **The Strategic Plan has been subject to at least the same level of Trust Board scrutiny as any of the Trust’s other internal business and strategy plans;**
* **The Strategic Plan is consistent with the Trust’s internal operational plans and provides a comprehensive overview of all key factors relevant to the delivery of these plans;**
* **All plans discussed and any numbers quoted in the Strategic Plan directly relate to the Trust’s financial template submission; and**
* **The ‘declaration of sustainability’ is true to the best of its knowledge.**

**Approved on behalf of the Board of Directors by:**

|  |  |
| --- | --- |
| Name  *(Chair)* |  |
|  |  |
| **Signature** |  |

**Approved on behalf of the Board of Directors by:**

|  |  |
| --- | --- |
| Name  *(Chief Executive)* |  |
|  |  |
| **Signature** |  |

**Approved on behalf of the Board of Directors by:**

|  |  |
| --- | --- |
| Name  *(Finance Director)* |  |
|  |  |
| **Signature** |  |

## Declaration of sustainability

|  |  |  |
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| |  |  | | --- | --- | | *The board declares that, on the basis of the plans as set out in this document, the Trust will be financially, operationally and clinically sustainable according to current regulatory standards in one, three and five years time.* | *Confirmed / Not confirmed* | |

## Market analysis and context

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| *Enter text* |

## Risk to sustainability and strategic options

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| *Enter text* |

## Strategic plans

|  |
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## Appendices

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| *Enter text* |