

THE MORECAMBE BAY INVESTIGATION

Chaired by Dr Bill Kirkup CBE

Investigation Summaries of Interviews December 2014

1 December 2014

SUMMARY OF THE INTERVIEW WITH HUGH REEVE

Hugh Reeve was interviewed on 1 December 2014 by Bill Kirkup, the Investigation Chairman, Stewart Forsyth the expert advisor in paediatrics and Julian Brookes the expert advisor on governance.

Hugh was interviewed because he was previously the Professional Executive Chair (PEC) at Morecambe Bay Primary Care Trust (PCT) and then subsequently the locality lead for South Lakes at Cumbria PCT and now holds the position of the Clinical Chair for Cumbria Clinical Commissioning Group (CCG).

Hugh was asked when he first became aware of issues of concern at the Trust. He was asked about the strategic planning for service delivery across the area and in particular the delivery of maternity services by the Trust. He was asked about the better care together initiative and how the service is affordable.

The Panel asked Hugh how the PEC became aware of the serious untoward incidents that had occurred at the Trust and how the current GP reporting system would ensure that any anomaly in the data or information that is collected by GPs would be reported to the CCG Board and brought to their attention.

SUMMARY OF THE INTERVIEW WITH LINDSEY BIGGS

Lindsey Biggs was interviewed on 1 December 2014 by Bill Kirkup, the Investigation Chairman, Stewart Forsyth the expert advisor in paediatrics and Julian Brookes the expert advisor on governance.

Lindsey was interviewed because she has held a midwifery post at the Trust since April 2005.

The Panel asked Lindsey about her duties and responsibilities and how these have changed from 2005 to date. She was asked in particular about the clinical governance structures at the Trust and how these have altered in her time there.

She was asked about audits that are undertaken and what learning practices and processes were in place to ensure that midwives maintained their ongoing professional development.

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Lindsey was asked about staffing and resourcing issues in the midwifery unit and about working relationships with obstetricians, paediatricians and the midwifery risk manager.

The Panel asked Lindsey about engagement with Trust management and about how issues of concern were raised and addressed by management.

The Panel asked Lindsey about incident reporting and the investigation processes undertaken both previously and currently. She was asked about training, learning and development by midwives and about communications generally within the midwifery unit.

In addition she was asked about cross bay working and the geographical challenges the midwives faced.

2 December 2014

SUMMARY OF THE INTERVIEW WITH GRAHAM HALL

Graham Hall was interviewed on 2 December 2014 by Julian Brookes the expert advisor on governance, Geraldine Walters the expert advisor on nursing and Stewart Forsyth the expert advisor in paediatrics.

Graham was interviewed because from the mid-1990s onwards he had a governance role at the Trust until his retirement in April 2013. Prior to retirement he was the non-clinical governance manager responsible for controls assurance, internal audit, corporate governance and risk.

Graham was asked about his role and responsibilities and about who he reported to at the Trust.

The Panel asked Graham about the organisation and structure of the governance function within the Trust and how serious untoward incidents were dealt with at the Trust including serious untoward incident reporting and how the governance team ensured that the Board was assured about the safety of maternity services following serious untoward incidents.

The Panel asked Graham about the Fielding Report and about Reports carried out by the Care Quality Commission (CQC) and the Central Manchester team.

Graham was asked about consistency of reporting across the Trust and about the culture and management approach regarding the reporting of incidents and consistency across the Trust.

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In addition Graham was asked about the communication of the outcome of reviews and investigations that had been undertaken.

SUMMARY OF THE INTERVIEW WITH LESLEY RYAN

Lesley Ryan was interviewed on 2 December 2014 by Julian Brookes the expert advisor on governance, Geraldine Walters the expert advisor on nursing and Stewart Forsyth the expert advisor in paediatrics.

Lesley is currently a paediatric nurse practitioner at the Trust and was previously a paediatric nurse practitioner and a paediatric matron at the Trust.

She was asked about her role and responsibilities as a nurse practitioner in both Barrow and Lancaster and about resourcing, staffing shortages and cross bay working.

The Panel asked Lesley about protocols and procedures in place to ensure the safety of the maternity service delivered, the paediatric service delivered and care received and about governance procedures in place. She was asked how concerns are raised and how those concerns are escalated. The Panel asked her what the escalation routes in place now are and what the procedures currently are when a concern is raised by any member of staff. The Panel asked Lesley about risk management and how the emphasis on risk management has increased and how this is demonstrated at the Trust.

4 December 2014

SUMMARY OF THE INTERVIEW WITH MARIE RATCLIFFE

Marie Ratcliffe was interviewed on 4 December 2014 by Bill Kirkup, the Investigation Chairman, and Stewart Forsyth the expert advisor in paediatrics.

Marie was interviewed as she had been a midwife at the Trust since 1990 and a midwifery coordinator from 1997 until she left the Trust in 2014.

The Panel asked Marie about her responsibilities and how they had changed over the years. She was asked about training and development and changes that had been developed in midwifery care during the period of time the Investigation is reviewing.

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Marie was asked about resourcing and how cover was provided for the midwifery rota. She was asked about working relationships between midwifery staff and obstetricians and between obstetricians and paediatricians and between all clinical staff and management.

The Panel asked Marie about working practices within the midwifery unit and in particular about the protocols that were in place. They asked about the categorisation of risk and about risk management, how incidents were reported and how serious untoward incidents were handled by the Trust. She was asked how the reporting of incidents had changed over the time the Investigation is reviewing and how the midwifery staff ensured that learning took place following a serious untoward incident and how this was embedded across the midwifery team.

SUMMARY OF THE INTERVIEW WITH JULIA DENHAM

Julia Denham was interviewed on 4 December 2014 by Bill Kirkup, the Investigation Chairman, and Stewart Forsyth the expert advisor in paediatrics.

Julia was interviewed because she was previously an Area Manager for Blackpool and Cumbria within the Care Quality Commission (CQC) and became the Head of Registration for the North and Central regions of the CQC.

Julia was asked by the Panel when she first became acquainted with the Trust and what her role was and what responsibilities she had in respect of the Trust.

Julia was asked about communications within the CQC regarding any concerns raised about the Trust and about the processes that the CQC undertook to ensure that any concerns were communicated and considered.

Julia was asked about the liaison the CQC had with the former North West Strategic Health Authority, the Parliamentary and Health Services Ombudsman (PHSO), the Trust and Monitor.

The Panel asked Julia about the CQC's registration process and the involvement by the CQC in the Trust's Foundation Trust application.

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15 December 2014

SUMMARY OF THE INTERVIEW WITH TONY HALSALL

Tony Halsall was interviewed on 15 December 2014 by Bill Kirkup, the Investigation Chairman, Geraldine Walters the expert advisor on nursing, Julian Brookes the expert advisor on governance and Jonathan Montgomery the expert advisor on ethics.

Tony was interviewed because he held the post of Chief Executive at the Trust from March 2007 until February 2012.

Tony was asked about the priorities he encountered in taking up his appointment and how he developed effective working relationships with colleagues at the North West Strategic Health Authority (SHA), the two Primary Care Trusts (PCTs) commissioning services from the Trust, the Care Quality Commission and Monitor.

He was asked about the management of serious untoward incidents and about governance arrangements at the Trust.

The Panel asked Tony about clinical leadership at the Trust and about the acute service review. He was asked how the Board operated and how he was accountable to the Board. In addition the Panel asked about the financial position of the Trust and about the Foundation Trust application process.

The Panel asked Tony about midwifery services at the Trust and about staffing issues including recruitment and retention of clinical, nursing and midwifery staff.

The Panel asked him about the external reviews that were undertaken following incidents that occurred at the Trust and in particular about the commissioning, handling and subsequent dissemination of the Fielding Report.

The Panel asked Tony about the electronic patient records system and how information was fed up to the Board and discussed and managed by various committees of the Board.

Tony was asked about Gold Command and about media interest in the Trust following some of the incidents that occurred at Furness General Hospital.

The Panel asked Tony about how staff raised issues of concern and how these were handled by the Trust Board.

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SUMMARY OF THE INTERVIEW WITH JOYCE McGULLION

Joyce McGullion was interviewed on 15 December 2014 by Bill Kirkup, the Investigation Chairman, Geraldine Walters the expert advisor on nursing, Julian Brookes the expert advisor on governance and Jonathan Montgomery the expert advisor on ethics.

Joyce was interviewed because she was a midwifery matron who provided cover at Furness General Hospital within the Trust in 2011.

Joyce was asked about her role and responsibilities whilst working at Furness General Hospital and about resourcing and recruitment to the midwifery department within the Trust.

The Panel asked Joyce about incident reporting and about communications between nursing and midwifery staff and clinicians and between clinical staff and management at the Trust.

The Panel asked Joyce about risk management and how incidents were investigated and about learning from incidents as a multidisciplinary team.

SUMMARY OF THE INTERVIEW WITH ANGELA BROWN

Angela Brown was interviewed on 15 December 2014 by Bill Kirkup, the Investigation Chairman, Geraldine Walters the expert advisor on nursing, Julian Brookes the expert advisor on governance and Jonathan Montgomery the expert advisor on ethics.

Angela was interviewed as she previously held the role of lead for the nursing and quality team at the North West Strategic Health Authority (SHA). Angela was asked about her role and responsibilities, specifically in relation to patient safety and clinical quality, and the workload that her post carried. The Panel asked Angela how the incidents at the Trust first came to her attention and how she then liaised with the Trust, Primary Care Trusts (PCTs) and the Local Supervisory Authority (LSA) regarding the incidents.

She was asked about information the SHA was provided by the Trust and the PCTs and how she reviewed serious untoward incident reports and discussed them with partner organisations including Monitor.

The Panel asked Angela about the Fielding Report and also about her interactions with LSA colleagues.

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Angela was asked about Gold Command and about the Trusts Foundation Trust application and the process for this.

She was also asked about STEISS – the serious untoward incident reporting system.