



IHPN Annual Report

2023-24



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The independent healthcare sector

Independent healthcare providers include both for-profit and not-for-profit organisations delivering both NHS and privately funded healthcare services, ranging from large international hospital groups to small specialist providers.

Volume & scope

In 2023, there were almost

2.25m

Acute patient journeys across the independent sector

Over **830,000** private patient journeys and over **1.4m** NHS patient journeys



5 million

operations, diagnostic tests and outpatient appointments for NHS patients delivered by independent sector providers in the past 12 months



3.5m+

Scans and tests were delivered by independent diagnostics providers



IHPN members provide healthcare services in over

1,800

sites across the UK



42%

of NHS community service providers are from the independent sector

Workforce

IHPN members employ or contract more than

150,000
people



1,045

clinical apprenticeships were delivered by IHPN members in 2023



5,058

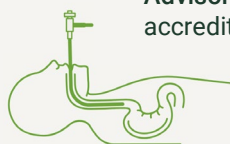
nursing placements were delivered by IHPN members in the past 12 months



Quality & safety

111

independent sector providers are **Joint Advisory group (JAG)** accredited



49% of all JAG accredited sites in the UK

14 of the top 20

providers under PROMs scores for primary Hip Replacement are from the independent sector



397

Freedom to **Speak Up Guardians** in the independent health sector



97%

of NHS inpatients treated by independent providers rate their care as good or very good



91%

of acute independent providers are rated either good or outstanding by the **Care Quality Commission**





About the Independent Healthcare Providers Network (IHPN)

Our Mission

IHPN is the membership network for independent healthcare providers. We play a leading role in the sector by bringing independent providers together, representing their interests, and supporting them to deliver great care to patients.

Our Vision

A thriving independent healthcare sector delivering great care to NHS and private patients.

Our Network

We have over 100 members that range in both size and the types of services they provide:



Scale – From the largest independent healthcare providers to smaller organisations



Services – The full range of clinical services including primary, community, diagnostics, hospital and specialist provision



Sector – Delivering great care to both NHS and private patients

IHPN in numbers 2023/24

Membership



IHPN members

108

10 more than 2022/23

IHPN
Commercial
Associates
adding value
to our
network



34

Engagement

1,170



Member attendees at IHPN
events and meetings



>95%

Membership renewal rate



27

Member visits building
connection and
understanding

Profile and impact



**4.7/5 record
attendee rating
for IHPN
annual summit**

Speakers included then
Secretary of State for Health
Steve Barclay MP



65,000

pageviews of IHPN's website
– a rise of 38%



232

Media mentions
– a rise of 109%

47

provider signatories
to IHPN Net Zero
commitment



3 major new reports

High impact
publications on

- Clinical training
- Independent
Sector Safety &
Quality
- Resident Doctors



1 award win

Trade Association
Forum winner for
Best Media Campaign





Chair's foreword

Seema Kennedy OBE

This report marks the end of my first year as Chair of IHPN and I couldn't have asked for a better twelve months.

It's been a privilege to spend my first year as your Chair immersing myself in independent sector healthcare and I've been tremendously impressed by the commitment to patients that is evident right across the IHPN membership.

As an area that is both highly regulated and in the political spotlight, independent healthcare needs effective representation. It's vitally important that government, the NHS, regulators, and other stakeholders can engage with the sector on a collective basis. The IHPN does a great job on behalf of our members, and I'm delighted that once again we have a really positive set of member survey results that are testament to the hard work and dedication of the IHPN team.

2023/24 was another challenging year for the UK health system. The NHS is still dealing with the Covid backlog and has been affected by widespread industrial action. The wider economic context has presented challenges to both individuals and businesses across the country.

As ever, despite this challenging backdrop, independent sector providers have risen to the challenge of delivering great care to both NHS and private patients.

"It's been a privilege to immerse myself in independent sector healthcare..."

Across the NHS, independent providers are a vital part of every local system and are making a huge contribution to the post-Covid recovery of services. I'm pleased that this has been recognised by policymakers and that we've seen many positive changes promoted by IHPN to improve the framework in which our members operate as part of the NHS – including a robust Provider Selection Regime, government backing for independent sector Community Diagnostic Centres, and the Prime Minister's Elective Recovery Taskforce.



Chair's foreword

Seema Kennedy OBE

On the private side, the industry continues to go from strength to strength. And while challenges accessing NHS care are certainly a factor in the growth of privately funded care, what shouldn't be overlooked is that the innovation and excellence on display across the industry means more and more patients are recognising the benefits of private treatment.

All of this is possible because the care delivered by independent healthcare providers is safe, effective and high quality. We know this because 2023 saw record CQC ratings across the sector with over 90% of acute sites and over 85% of diagnostic sites rated Good or Outstanding. There are 330 Freedom to Speak Up Guardians across independent healthcare – reflecting a commitment to openness and continuous improvement that I believe provides a strong foundation to go from strength to strength.

IHPN exists on behalf of its members, and I'd like to thank the IHPN Strategic Council for their positive contributions over the past year. I'd also like to thank IHPN CEO David Hare for his energetic leadership that I know is recognised and appreciated by members and the IHPN team.

"...the innovation and excellence on display across the sector that means more and more patients are recognising the benefits of private treatment."

All of that positivity and energy will be needed over 2024 with a General Election on the horizon. Once again, this will require the kind of effective representation that IHPN provides for its members, and we look forward to a busy and productive year ahead.

A handwritten signature in black ink, appearing to read 'Seema Kennedy'.

Seema Kennedy OBE
Chair, IHPN

Chief Executive's update

David Hare MBE



At the start of 2023/24 we presented a strategy to members centred around the idea of normalising independent healthcare for both NHS and private patients by promoting the safety and quality of the sector, securing an important role within the NHS, and driving improvement in the accessibility of private care. Looking back over the past year, I think we can be proud of the progress we have made.

This year has seen further steps forward in both promoting high standards of safety and quality across the sector as well as further embedding independent providers within national systems. We know that external organisations such as the CQC view as vital the work that IHPN is doing in this space and that member organisations have better opportunities than ever to collaborate to improve standards in the sector. Two of the highlights of the year have been our annual joint conference with the CQC in May, and more recently our publication in January 2024 of the first ever standalone data set about the quality of care in independent sector healthcare.

I'm also pleased to report to members that 2023 has been a breakthrough year in securing political consensus around the role of the independent sector within the NHS. For too long politicians were overly cautious about endorsing the crucial role of independent

providers who bring innovation, capability and much needed capacity to an overstretched public system.

"...2023 has been a breakthrough year in securing political consensus around the role of the independent sector within the NHS."

The Prime Minister's Elective Recovery Taskforce, which reported in the summer of 2023, is the best example of how the value of independent providers to the NHS is now widely and openly acknowledged. The Opposition has also been vocal about the need to use independent sector capacity as part of the NHS recovery effort so I'm pleased that we are going into an election year with welcome pragmatism and positivity on both sides of the political aisle.

Chief Executive's update

David Hare MBE



Importantly, support for the independent sector within the NHS has also been coupled with reforms to patient choice and NHS procurement rules – both critical enablers for independent providers. I'm delighted that IHPN's hard work in those areas has shown real impact.

“More than ever before IHPN's work this year has focused on the growing and thriving market in privately paid services.”

More than ever before IHPN's work this year has focused on the growing and thriving market in privately paid services. Our award-winning *Going Private 2023* report highlighted the positive views about private care that are held across the population and focused on the increasing use of the sector by younger people. We've had record levels of media coverage this year telling the story about what the sector can offer, and I'm delighted that we've also acknowledged the shifting provider landscape through an increasing focus on private primary care alongside hospital services.

We hit a significant milestone this year by welcoming our 100th member and we are delighted that IHPN continues to attract the support of members old and new. But as you know, IHPN never stands still, and our new Women Leaders Network is a signal of intent that in 2024/25 we want to continue to drive positive change across the sector as well as providing the support to members that remains our key priority.

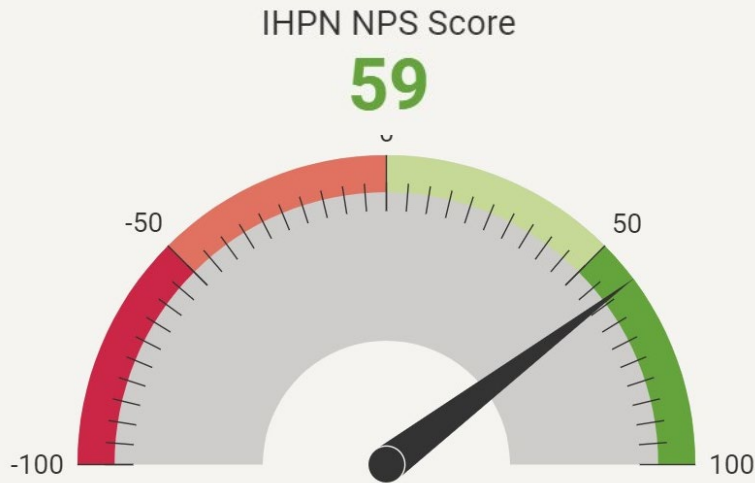
I'm very grateful to our Chair Seema Kennedy for her leadership, and to the IHPN team for another fantastic performance over the past year.

A handwritten signature in blue ink that reads "David Hare".

David Hare MBE
Chief Executive IHPN

IHPN Member Survey Results – 2023/24

How likely is it that you would recommend IHPN to a friend or colleague?



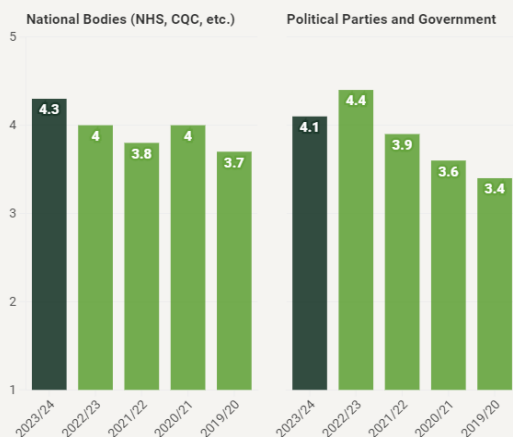
Each year IHPN runs a member survey to help understand member views and to set IHPN priorities for the year ahead.

The survey was conducted online in December 2023. In total we received 72 responses – an increase of 27% on the previous year’s survey.

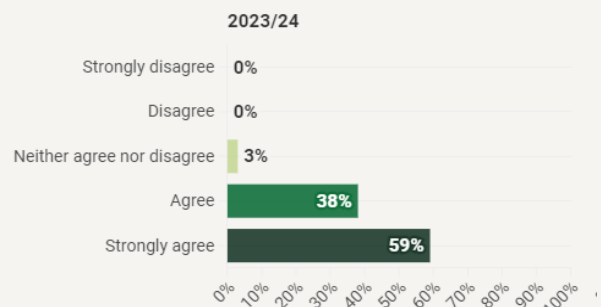
The most significant finding is that our Net Promoter Score (NPS - a widely used benchmark of customer satisfaction) is +59. This score remains stable against previous years and remains an extremely positive score given results above +50 are rated as outstanding in most UK industries.

Members are supportive of the policy positions taken by IHPN and think that we are influential with a wide range of external bodies.

How effective has IHPN been at influencing the following (1=Very Negative 5=Very positive)



To what extent would you agree with the statement "my organisation supports the policy positions taken by IHPN"?



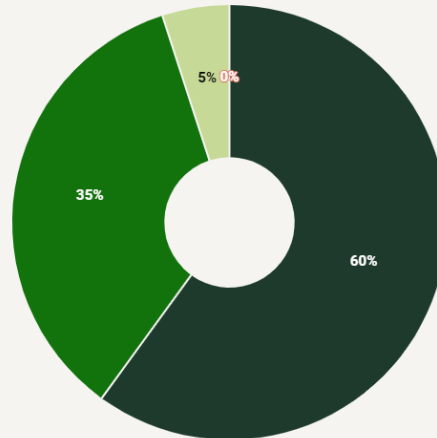
IHPN Member Survey Results – 2023/24

Members tell us that they are satisfied with the content and frequency of IHPN communications and that IHPN meetings are valuable to attend.

We also once again scored highly in our responsiveness, with members telling us that we are easy to contact, respond quickly to queries and provide helpful and knowledgeable advice.

Overall, how satisfied are you with the level of communication you receive from IHPN?

Very Satisfied Satisfied Neither satisfied nor unsatisfied Unsatisfied Very unsatisfied



Please score how much you agree with the following statements regarding your experiences with IHPN over the past 12 months. (1=Very Poor 5=Very Good)

2023/24 Average Score 2022/23 Average Score



“It is hard to get the right balance now that the membership is a broader church of providers, but the balance feels about right.”
Member comment

“Very good support from IHPN.
Thank you!”
Member comment

“As a stand-alone hospital it can be challenging to feel you have a voice. IHPN allows me to have that”
Member comment



IHPN workplan 2023/24

IHPN's workplan for 2023/24 was agreed by the Strategic Council and signed off by members at our 2023 AGM. Our core objective is to continue the journey of normalising independent healthcare for both NHS and private patients by:

- 1 Promoting the quality and safety of independent sector healthcare
- 2 Promoting the contribution of independent sector healthcare to the wider UK health system and economy
- 3 Securing an important role for independent providers within the NHS
- 4 Driving improvement in the accessibility of private healthcare to patients
- 5 Navigating a general election campaign and possible change of government (2024 onwards)

2023/24 saw excellent progress in our focus areas with key achievements outlined on the following pages.



Promoting the quality and safety of independent sector healthcare (1)

- **Held the fourth Annual Patient Safety conference alongside the CQC** with over 100 members hearing from senior speakers with an agenda tailored to independent providers.
- **Worked with the CQC and members to manage the implementation of the new CQC Assessment Framework** to minimise risk and ensure that members are well equipped to work within the new approach.
- **Supported members with implementation of the new Patient Safety Incident Response Framework (PSIRF)** by running a dedicated conference.
- **Published the sector's first report on Quality and Safety within the independent sector.**
- **Created *Working with Resident Doctors to Ensure High Quality Care*** setting out principles co-developed by providers and stakeholders including Royal Colleges and the General Medical Council outlining best practice in resident doctor services.
- **Launched a dedicated Clinical Diagnostics and Imaging Forum for clinical leaders in a diagnostic setting** with engagement from the Society of Radiographers and the CQC.



Promoting the quality and safety of independent sector healthcare (2)

- **Launched the new Infection, Prevention and Control Forum** with a flagship event which included speakers from Sepsis UK, NHS England, and a session on theatres and ventilation standards.
- **Launched the new Pharmacy and Medication Safety Forum** with speakers from CQC talking about controlled drugs regulation and updates from the Royal Pharmaceutical Society and UKHSA.
- **Facilitated Clinical Forum engagement with NHSE's Clinical Director on Shared Decision Making, Quality Accounts, and with the CQC** to provide input from members on the development of their new provider portal.
- **Held a session with NHSE on the introduction of the Medical Device Outcomes Registry (MDOR) and the Implant Registry Platform (ORP)** to equip members to manage implementation.
- **Ran networking events and senior level dinners for Chief Nurses and Chief Medical Officers** to help connect leaders around the sector.
- **Represented the independent sector at the Annual Community Nursing Stakeholder Panel** to give a voice to the sector and highlight the important contribution of community providers.



Promoting the contribution of independent sector healthcare to the wider UK health system & economy

- **Delivered IHPN's biggest ever Annual Summit** with speakers including the Secretary of State for Health and Social Care.
- **Published the latest IHPN Industry Barometer** providing key insights about market trends across NHS and private care.
- **Submitted a witness statement to the UK Covid-19 Public Inquiry** about the role of the independent sector in the health system response to the crisis in expectation of being called as a witness in 2024.
- **Held IHPN's first ever Net Zero conference**, created a library of resources to help members achieve Net Zero, and led discussions with private medical insurers around aligned Net Zero ambitions.
- **Created the first ever Women Leaders Network for independent sector healthcare** to promote and encourage female leadership across the sector.
- **Published the first data set about clinical training** within the independent sector, highlighting the range and breadth of training opportunities.



Securing an important role for independent providers within the NHS

- **Played a key role on the Prime Minister's Elective Recovery Taskforce** and secured important commitments on Payment by Results, strengthening patient choice, and provider accreditation.
- **Facilitated ongoing industry dialogue with NHSE on delivery of their commitments in the Elective Recovery Taskforce.**
- **Promoted the contribution of independent sector community services providers** through producing case studies, advancing the data agenda and delivering opportunities for members in Virtual Wards and intermediate care.
- **Ensured that NHS pay uplifts were reflected in normal funding mechanisms** including uplifts to tariff pricing and local contracts.
- **Worked closely with government and NHSE to advocate for an expanded role for the independent sector within the Community Diagnostic Centres (CDC) programme** and gave evidence to the All-Party Parliamentary Group (APPG) panel on CDCs.
- **Furthered the development of the Insourcing market** including by ensuring that Insourcing is a key part of Taskforce implementation.
- **Successfully delivered key changes to strengthen the NHS Provider Selection Regime** including an independent complaints panel to drive fair and transparent decision making by NHS commissioners.



Driving improvement in the accessibility of private healthcare to patients

- **Published *Going Private* - our first major research into consumer attitudes to private healthcare** with widespread media coverage and made the full data available to members.
- **Frequent commentary in the media on patient views on private care** and the drivers for their choices.
- **Lobbied for the inclusion of PMI alongside other occupational health services as part of tax incentives** for small and medium sized enterprises to promote good health at work.
- **Launched a dedicated Private Primary Care group** and published “Going Private: primary care” highlighting key trends in the market.

Other key IHPN achievements

- **Trade Association Forum award winner 2024 for Best Media Campaign** for our work on *Going Private*.
- **Association Excellence Awards finalist for 2023** in the Best Membership Support category for the Medical Practitioners Assurance Framework as well as being a finalist for “UK Association of the Year”.
- **Redesigned our core communications with a new Weekly Update & refreshed and relaunched the website.**
- **Celebrated the milestone of reaching one hundred members.**

IHPN Scotland is the representative body for independent acute and mental health providers in Scotland and is chaired by Nuffield Health Edinburgh Hospital Director Ken Hay.

IHPN Scotland meets on a quarterly basis and provides a forum for discussing pertinent issues for the membership with updates from a wide array of stakeholders including the Scottish Government, the General Medical Council and Healthcare Improvement Scotland. In addition, IHPN Scotland hold annual meetings with Scotland's Chief Nursing Officer to discuss a wide range of clinical matters including how the independent sector can increase the support it provides to training and placements for nursing, theatre, radiology and physio students.

Over the past 12 months, IHPN Scotland has worked on projects such as the Scottish Government's Unique Medical Devices project, which has recently been replaced by the Scan for Safety programme which aims to improve the traceability of medical devices through point of care scanning and digital data capture. There remains a strong focus on increasing independent sector participation in audits, such as the Pelvic Floor Registry and the Scottish Arthroplasty Project. IHPN Scotland have also accepted an invite to participate in setting up the Medicines Information Systems (registries) which arose from the recommendation for mandatory, patient-identifiable medicines registries as part of the Cumberlege Review report, *First Do No Harm*.

IHPN's Director of Regulation, Dawn Hodgkins, and Head of Patient Safety and Quality Governance, Linda Jones endeavour to ensure all sectors within IHPN Scotland are represented and to continue to enhance communication and collaboration across the membership.

Looking ahead, IHPN Scotland will continue to work to adapt the Medical Practitioners Assurance Framework (MPAF) for Scotland and to engage with the Scottish Government and Health Improvement Scotland to ensure MPAF provides value to IHPN Scotland members and their patients.



IHPN Wales, chaired by Werndale Hospital's Executive Director Jacky Jones, is the representative body for independent healthcare providers in Wales.

IHPN Wales meets quarterly including two joint meetings with the Welsh Government, as well as Healthcare Inspectorate Wales. IHPN Wales also hold annual meetings with Sue Tranka, Wales Chief Nursing Officer.

The Welsh Government continues to engage with the independent sector particularly in relation to the application of the Duty of Candour within Independent Health Care Providers in Wales and implementation of the Patient Safety Incident Response Framework (PSIRF).

Representatives from IHPN Wales regularly attend meetings external stakeholder groups such as the Welsh Nursing and Midwifery Committee and All Wales Decontamination and Sterilisation Advisory Group. IHPN's Director of Regulation, Dawn Hodgkins, and Linda Jones, Head of Patient Safety and Quality Governance are working closely with the Welsh network to ensure all sectors within IHPN Wales are represented and to continue to enhance communication and collaboration across the membership.

Welsh Government have recognised the Medical Practitioner Assurance Framework as good practice for the independent sector in Wales and have written to IHPN and HIW to encourage its use across IHPN Wales members.

IHPN Forums and Groups

IHPN’s forums and groups are at the heart of our mission to bring all types of providers together. In 2023/24 our existing groups have gone from strength to strength with increased attendance and a vibrant work programme across all our areas of work. We have also been pleased to launch several new groups and forums, reflecting the increasing breadth of the IHPN membership and the depth of our membership offer.

| Sector Groups | Forums and Groups |
|---|--|
| <div data-bbox="112 600 409 710">Community Services</div> <div data-bbox="427 600 724 710">Diagnostics</div> | <div data-bbox="756 600 1053 710">Clinical Forum</div> <div data-bbox="1074 600 1371 710">CNO/CMO Groups</div> |
| <div data-bbox="112 727 409 838">Insourcing</div> <div data-bbox="427 727 724 838">Specialist Ophthalmology</div> | <div data-bbox="756 727 1053 838">Digital Leaders</div> <div data-bbox="1074 727 1371 838">Finance Forum</div> |
| <div data-bbox="112 855 409 966">Private Primary Care*</div> <div data-bbox="427 855 724 966">NHS Primary Care*</div> | <div data-bbox="756 855 1053 966">HR Forum</div> <div data-bbox="1074 855 1371 966">Net Zero Group</div> |
| <p data-bbox="130 1357 403 1387">* new group for 2023/24</p> | <div data-bbox="756 983 1053 1093">Communication Group</div> <div data-bbox="1074 983 1371 1093">Diagnostic and Imaging Group*</div> <div data-bbox="756 1093 1053 1204">Infection, Prevention and Control Forum*</div> <div data-bbox="1074 1093 1371 1204">Share & Learn Community of Practice*</div> <div data-bbox="756 1204 1053 1315">Pharmacy & Medication Forum*</div> |

IHPN Strategic Council

IHPN's Strategic Council agrees our annual business plan and sets our strategic agenda. The Council meets five times a year and is currently made up of the following member organisations. The number of meetings attended by each organisation is set out below.



Alliance Medical
UK Managing Director,
Richard Evans [4]



Circle Health Group
CEO, Paolo Pieri [5]



Cleveland Clinic London
President, Dr Robert
Lorenz [3]*



Connect Health
Executive Chair, Andrew
Walton [4]



Genesis Care
CEO – UK and Europe,
Justin Hely [5]



HCA Healthcare UK
UK President and CEO,
John Reay [4]



Healthshare
Chair, KP Doyle [4]



Horder Healthcare
CEO, Richard Tyler [4]



HCRG
Executive Chair,
Stephen Collier [5]



IHPN
Chair, Seema Kennedy
OBE [5]



IHPN
CEO, David Hare [5]



IHPN
Clinical Director, Dr
Howard Freeman [5]



InHealth
Chair, Richard Bradford [4]



Nuffield Health
Chief Commercial Officer
James Murray [4]**



One Medical Group
Co-Founder & Executive
Chair Rachel Beverley-
Stevenson [5]



Practice Plus Group
CEO, Jim Easton [4]



Ramsay Health Care UK
CEO, Nick Costa [5]



Specsavers,
Director of NHS Services,
Stephen McAndrew [5]



Spire Healthcare,
CEO, Justin Ash [5]



The London Clinic
CEO, Al Russell [4]



Vanguard Healthcare
CEO, Chris Blackwell Frost
[4]

*Cleveland Clinic London were represented by Dr Tommaso Falcone from April-June 2023

**Nuffield Health were represented by Wouter Van Den Brande from April 2023-January 2024

IHPN Board of Directors

In line with the Articles of Association, IHPN has four Directors. In 2023/24 the Directors met four times.



Seema Kennedy OBE
Chair, IHPN



Richard Bradford
Chair, InHealth Group

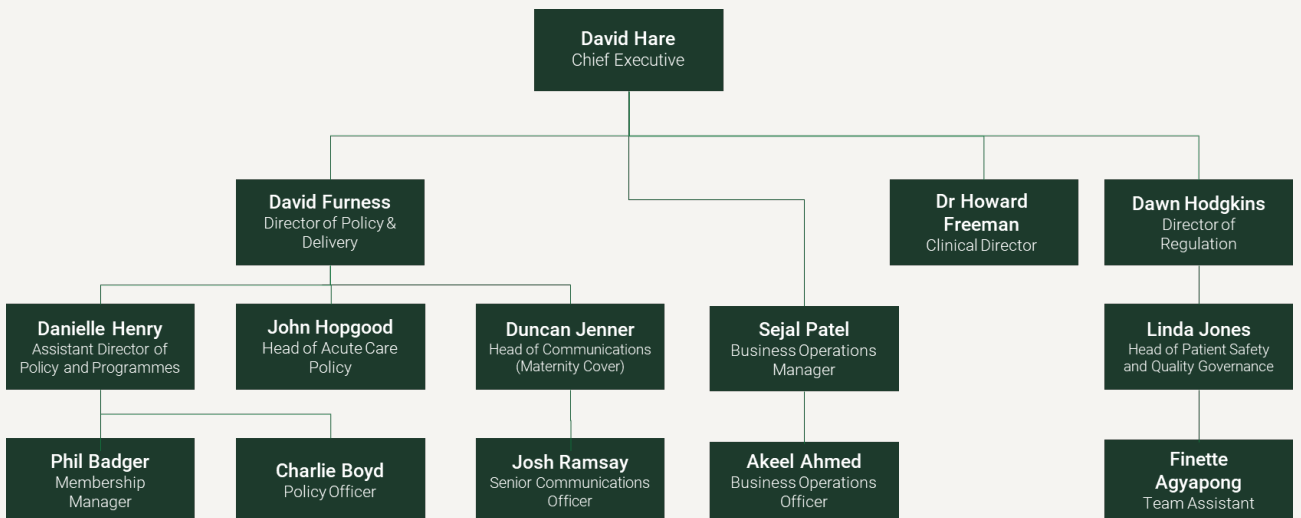


Jim Easton
Chief Executive,
Practice Plus Group



David Hare MBE
Chief Executive, IHPN

IHPN team





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