

Prof Stewart Irvine  
Medical Director  
NHS Education for Scotland  
Westport 102  
West Port  
Edinburgh EH3 9DN



Telephone: 0131 656 3200  
Fax: 0131 656 3201  
[www.nes.scot.nhs.uk](http://www.nes.scot.nhs.uk)

Date: 13 November 2013

Dear Colleague,

### **NES ePortfolio : Outcome of 1<sup>st</sup> Phase : Ownership and Management of NES ePortfolio**

In June we announced our intention to undertake a review of the ownership and management of the NES eP<sup>1</sup>. We decided to undertake this review in recognition of the rapid growth of the eP, and concerns that opportunities for its further development might be constrained due to the financial and governance arrangements which apply to NES as a Special Health Board.

We have completed the first phase of our review and have undertaken an option appraisal based on the three options we identified in our paper;

Option1 - Do Nothing

Option 2 - Further development of eP within NES

Option 3 - Joint venture between NES and a third party.

By our deadline for receipt of initial proposals we received 7 submissions from third parties to develop a joint venture with NES. The submissions received were generally all of a high quality and followed a number of constructive meetings with nearly all of the third parties who submitted proposals. The review project team also developed Option 2 to support the further development of eP within NES.

The outcome of the first phase of the review has been a decision by NES to continue to manage the development of the eP in-house. In summary, we concluded that meeting the future needs of trainees, students and other eP stakeholders was best protected by retaining the eP within NES. However, the review also high-lighted that there were aspects of the future development of the eP which NES was not best placed to manage and we may consider partnership arrangements in due course to address these issues more effectively.

We are very pleased that ePortfolio will remain within NES (Option 2) and a Short life Working Group consisting of a number of senior managers is being assembled to develop a sustainable plan that will ensure ePortfolio continues to evolve and adapt to meet the needs of healthcare staff.

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<sup>1</sup> The paper announcing the review is available at:

<http://www.nes.scot.nhs.uk/education-and-training/by-discipline/medicine/about-medical-training/eportfolio-consultation.aspx>



Chair: Dr Lindsay Burley  
Chief Executive: Malcolm R. Wright

We have been encouraged by the interest shown in ePortfolio throughout the review period and it has become clear that NES has developed a system of great value. The commitment from our wide range of stakeholders – NES Professional Groups, Medical Royal Colleges, Postgraduate Deaneries, University Medical Schools, healthcare trainees - to real partnership working has meant that the ePortfolio is now firmly embedded in the processes supporting, recording & assessing many thousands of NHS and related staff.

The many discussions we have had with external organisations during this review have demonstrated the great breadth of expertise that we have now developed within NES in ePortfolio development and service provision. The process has also helped us to clarify the constraints of our current operating model and a great deal of work now has to be done to ensure these constraints can be addressed within NES.. This will include the development of a strategic plan for eP growth ensuring we continue to work effectively with stakeholders. We recognise the opportunities to work with a wide range of professional groups in the future and we will also aim to develop a dedicated eP investment fund to ensure priority developments can be planned ahead of time. The Short Life Working Group will take this work forward.

The last months have been a period of uncertainty for the ePortfolio team and there have been some staffing changes as a result. We understand the importance of retaining staff commitment through any period of change and we will work with our HR team to make sure the ePortfolio team is well supported as we work through the detail of Option 2. We have a team that not only understands software development but has an awareness of healthcare training and in-depth knowledge of how the ePortfolio is – and could be - utilised within this complex environment.

The decision to retain the ePortfolio within NES was not taken on the basis of a lack of alternatives. On the contrary, we were very impressed by the quality and expertise of the various organisations who were keen to develop a formal partnership with NES to take ePortfolio forward.

We are looking forward to distributing information in early 2014 outlining how the issues raised and opportunities discovered will be addressed and we very much hope that you will continue to work with us as partners and customers to develop a sustainable future for the ePortfolio. We have also reviewed the results of the stakeholder survey undertaken recently which are attached at Appendix 1. We are very grateful to all those who took part in this survey. This has been a very useful exercise and we intend to use these results to help us develop our detailed plans for the development of eP in the short to medium term.

We will aim to provide further details on the outcome of the second phase of the review early in 2014.

### **Update on eP Operational Issues**

When we issued our last update report in September we noted some progress in addressing concerns which had been expressed by customers in respect of scheduling of eP development activity and customer response times which had fallen below our normal delivery standards.

Since then we have increased our development capacity and focused on prioritising development requests. We have now made good progress in managing our backlog of development work and will continue to focus on this aspect of our work.

We will send out a further update report with the results of the second stage of the review early in 2014.

Meanwhile, if you have any queries please do not hesitate to contact me or any member of the eP management team.

Yours sincerely

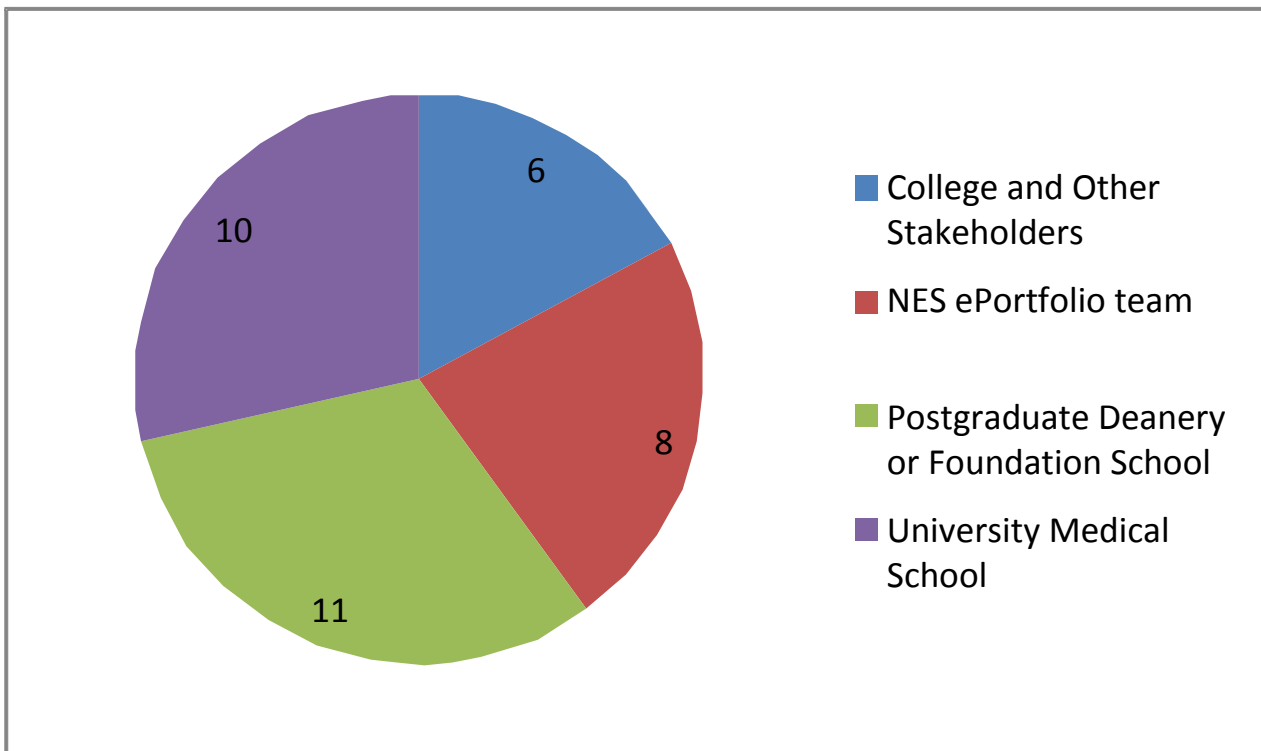
**Jayne Scott**

eP Review Project Team

## Appendix 1

### Survey results summary.

#### 1. Please indicate which group you represent.



Total responses = 35

**2. Please indicate how important you consider the following statements in relation to the future ownership, management and development of the NES ePortfolio.**

Responses ranked by order of average score for importance

No	Question	Score*	Not important	Somewhat important	Important	Very important
10	Commitment to evolving and developing the ePortfolio	2.91	0	1	1	33
13	To continue to be responsive to user requirements	2.88	0	0	4	31
8	Ensuring the continued delivery of a UK-wide ePortfolio	2.8	0	0	7	28
11	To continue to engage user groups in the development programme	2.8	0	0	7	28
19	To continue to work in partnership with Colleges & other client organisations in any decisions about the future of the ePortfolio	2.71	0	1	8	26
14	Continued commitment to clear and tight timetables (eg UKFPO annual requirements)	2.68	0	2	7	26
24	Further development of reporting functions	2.57	0	4	7	24
16	To honour quotations for development work already agreed	2.51	2	2	7	24
15	To demonstrate value for money in service and efficiency of operations	2.51	0	4	9	22
21	Further development of data exchange	2.45	0	6	7	22
23	Further development of the ePortfolio mobile app	2.45	1	3	10	21
25	Further investment in improving the speed of the ePortfolio application	2.45	0	3	13	19
20	To have a transparent pricing structure available to all.	2.28	2	3	13	17
1	* All users are not disadvantaged by any changes and continue to be well supported by the ePortfolio. The priority for NES will be to ensure Scottish Users are properly supported.	2.23	1	7	9	17
17	To ensure individual doctors have access to their existing ePortfolio records for a minimum period of 5 years post-CCT	2.14	1	8	10	15
18	To ensure supervisors continue to have access to trainee ePortfolio records following the end of the training programme to support their own appraisal / revalidation	2.08	1	8	13	13
3	* The business model promotes the maximum opportunity for development and utilisation of ePortfolio within and out with the UK	2.05	4	6	9	16
12	To provide opportunities to further develop ePortfolio with a wide range of professional groups	2.05	2	7	13	13
22	Further use of ePortfolio data for research	1.91	1	10	15	9
7	* The interests of the NES staff involved are protected	1.88	4	7	13	11
2	* NES continues to influence the strategic direction of ePortfolio, for the benefit of all professional groups	1.65	7	9	8	11
4	* NES should receive an income stream that reflects the level of investment that has been committed to the project to date and ensures future costs to NES are minimised	1.51	6	10	14	5
6	* NES risk is minimised from reputational damage	1.4	10	7	12	6
5	* NES risk is minimised from liability from product delivery failure	1.34	9	9	13	4
9	Ensuring the continued delivery of an ePortfolio outside the UK	1.2	9	17	2	7

\* Score calculated as average of importance where Not important = 0 to very important = 3

### Breakdown of importance by respondent group (average scores)

Question	RC	NES	PGD	MS
All users are not disadvantaged by any changes and continue to be well supported by the ePortfolio. The priority for NES will be to ensure Scottish Users are properly supported.	2.33	2.14	2.27	2.20
NES continues to influence the strategic direction of ePortfolio, for the benefit of all professional groups	1.50	1.50	1.64	1.90
The business model promotes the maximum opportunity for development and utilisation of ePortfolio within and out with the UK	2.00	2.88	1.64	1.90
NES should receive an income stream that reflects the level of investment that has been committed to the project to date and ensures future costs to NES are minimised	1.00	1.63	2.09	1.10
NES risk is minimised from liability from product delivery failure	0.83	1.38	1.82	1.10
NES risk is minimised from reputational damage	0.83	1.50	1.82	1.20
The interests of the NES staff involved are protected	1.83	2.63	1.82	1.40
Ensuring the continued delivery of a UK-wide ePortfolio	2.83	2.88	2.82	2.70
Ensuring the continued delivery of an ePortfolio outside the UK	1.33	2.25	0.73	0.80
Commitment to evolving and developing the ePortfolio	3.00	3.00	2.73	3.00
To continue to engage user groups in the development programme	3.00	2.63	2.82	2.80
To provide opportunities to further develop ePortfolio with a wide range of professional groups	2.17	2.50	1.91	1.80
To continue to be responsive to user requirements	3.00	3.00	2.73	2.90
Continued commitment to clear and tight timetables (eg UKFPO annual requirements)	2.50	2.63	2.73	2.80
To demonstrate value for money in service and efficiency of operations	2.33	2.50	2.45	2.70
To honour quotations for development work already agreed	2.33	2.38	2.45	2.80
To ensure individual doctors have access to their existing ePortfolio records for a minimum period of 5 years post-CCT	2.67	2.00	2.10	2.00
To ensure supervisors continue to have access to trainee ePortfolio records following the end of the training programme to support their own appraisal / revalidation	2.33	2.13	1.91	2.10
To continue to work in partnership with Colleges & other client organisations in any decisions about the future of the ePortfolio	2.83	2.88	2.45	2.80
To have a transparent pricing structure available to all.	2.33	2.38	2.18	2.30
Further development of data exchange	2.83	2.13	2.55	2.40
Further use of ePortfolio data for research	1.83	1.50	2.09	2.10
Further development of the ePortfolio mobile app	2.83	2.63	2.00	2.60
Further development of reporting functions	2.67	2.38	2.55	2.70
Further investment in improving the speed of the ePortfolio application	2.83	2.00	2.45	2.60

Key: responses coloured by quintile for each group

Top quintile

Fourth quintile

Middle quintile

Second quintile

Bottom quintile

