

Southern Health was created from the merger of Hampshire Partnership NHS Foundation Trust and Hampshire Community Health Care in 2011. In November 2012 it took over the Ridgeway Partnership, which provided learning disability services in Oxfordshire.

Patient deaths

In July 2013, 18-year-old Connor Sparrowhawk drowned after having an epileptic fit in a bath at the trust's short assessment and treatment unit in Slade House Oxfordshire, which prompted NHS England to commission Mazars, the auditing and consultancy group, to conduct an in-depth investigation into how the Trust had dealt with incident and others involving the death of patients, and what failings had arisen surrounding its processes and procedures.

The Mazars Report

The subsequent Mazars report blamed a "failure of leadership" at the trust. The study examined all deaths at the trust between April 2011 and March 2015 and found that the trust could "not demonstrate a comprehensive systematic approach to learning from deaths".

An investigation that found that over 1,000 unexpected patient deaths at the trust had not been investigated. The report said the trust investigated just 13% of 1,454 unexpected patient deaths. Of patients with learning disabilities, only 1% were investigated, and of over-65s with mental health problems, only 0.3% were looked into.

In May 2016, Southern Health admitted responsibility for Connor Sparrowhawk's death and promised to pay £80,000 compensation to his family and publish a statement explaining the failures that led to his death.

What happens next?

On June 30 2016, the Interim Chair, Tim Smart, issued the following statement:

I would first like formally to extend my deepest apologies to the individuals and families who have been deeply affected by recent events. I can only imagine the pain they are suffering.

I was appointed to make an objective assessment of the reasons behind the failings at Southern Health and the best way forward for the Trust, its patients and its staff.

In the last six weeks I have reviewed the available evidence. I have met with many individuals and organisations, including patients, families, staff and Governors. I have also initiated an independent Board Capability Review.

I am confident that we are making progress, and I know that our staff are doing everything they can to deliver high quality care. But it is clear that some of our more complex services feel less connected to the organisation.

It is my opinion that the Board of Southern Health should have spent longer in its early years creating an integrated, patient focused, operationally efficient culture. Before it did that, it acquired the Ridgeway Partnership despite understanding the risks. Ever since, the Executive team has been too stretched to guarantee high quality services everywhere that Southern Health operates. To resolve this failure changes are being made to the Board.

On the basis of the evidence before me, I am recommending that Southern Health transform the way in which it delivers services, and makes changes to the structure and strength of its leadership team:

1) Following the outcome of the Board Capability Review, I am satisfied that whilst the Board should have acted in a more united way, I have found no evidence of negligence or incompetence of any individual Board member. As we progress with delivering the strategic plans for the organisation, consideration will be given to the findings of the Board capability review and further strengthening of the Board will be required to ensure the best balance of skills and expertise.

2) I know there is interest in the Chief Executive of the organisation and I can confirm that Katrina Percy will continue in this role. However, until now she has been too operationally focused in her role. She will shift her focus to delivery of the future strategy of the Trust which I believe needs to be accelerated. The Executive team will be restructured, to allow a more concentrated effort on the day to day delivery of high quality, safe services for patients. This will require a much more outward looking Board, which will at the same time put absolute priority on improving the quality of services provided.

3) It is clear to me that the Trust needs to change the way it delivers services because currently it operates across too broad a spectrum of clinical services and too wide a geography. The plan is for Learning Disability Services provided by Southern Health in Oxfordshire to be transferred to Oxford Health NHS Foundation Trust as soon as agreement is reached. Other changes will occur.

4) I will establish a Steering Group to further develop and accelerate implementation of Southern Health's strategic vision for the future, alongside the soon-to-be published Sustainability and Transformation Plan (STP) for Hampshire and the Isle of Wight. The Steering Group's first task will be to commission a review of the way Southern Health's services are organised. This will be led by clinicians and commissioners, and it will result in the future form of Southern Health being changed.

Based on my experience and the evidence presented I am confident that these recommendations will see an improvement in the running of the Trust and most importantly in the care provided to patients. We must acknowledge, however, the failures that have occurred in the past and I again unreservedly apologise for this.

The way forward is complex and difficult and success will be dependent on excellent team work within Southern Health, and first class collaborative working with all local stakeholders, patient groups, provider organisations, commissioners, regulators and staff. Southern Health provides good and essential services to a very large population. The Board must now work together to ensure that care quality continues to improve.

I would like to extend my thanks to all of those individuals and organisations who have lent their time and commitment to this important review process.

Service changes

In July 2016, it was announced that Southern Health would give up responsibility for learning disability services in Oxfordshire, which would be taken over by Oxford Health NHS Foundation Trust.

Change of CEO

On Tuesday August 30 2016, it was announced that Katrina Percy would step down from her position as Chief Executive, citing media attention. However, she will retain her salary and will continue to be employed by the trust in a “strategic” role.