



**South West Skills Development**  
Improving finance and procurement skills  
across the NHS



# Finance and Procurement Skills Development Network

2020/21 programme

South West



# Development areas

HFMA work with our FSD and PSD leads to develop and provide coordinated and comprehensive training and development opportunities for finance and procurement staff in the NHS. The programme is built around a number of key development areas:

## Skills Development

A series of interactive workshops to help you enhance the practical skills required day to day.

## CPD/technical seminars

These seminars will provide you with the opportunity to develop your technical skills in specific areas and enhance your healthcare finance know-how. Note VAT training will now be available through the HFMA SW branch.

## Masterclasses

In today's challenging NHS landscape, our masterclasses are provided to support you with interpersonal, personal, management and leadership development.

## Finance for non-finance

Due to restrictions on social gatherings, in 2020 SW SDN is providing access to the collection of HFMA bitesize short courses (5 per organisation) A full list can be found below.

## Developing talent programme

A five-module leadership programme for senior finance and procurement professionals in the NHS. Now available to attend on a module by module basis subject to availability (excluding 1 & 5)

## Webinars

A selection of online and on demand webinars – ideal for when resources are tight and a day out of the office isn't viable.

## Meetings and networks

Updates, collaborative discussions and sharing of best practice from across your region.

# SW SDN 2020/21 programme

Please note that this is a guide and may be subject to change. Credits are charged per delegate place.

| Date   | Description  | Location | Credits              |
|--|--|----------|----------------------|
| <b>All year</b>  | <b>HFMA bitesize short courses</b><br>Due to restrictions on social gatherings, in 2020 SW SDN is providing access to the collection of HFMA bitesize short courses. Please check if you are already subscribed to bitesize short courses through your organisations.  | Online   | 1<br>(max 5 per org) |
| <b>Target:</b> All NHS finance and procurement professionals |  |          |                      |
| <b>9 Sept</b><br>09:30 – 11:30                               | <b>CPD/Technical: COVID 19 Update Phase 3 - Recovery and Restoration</b><br>This two-hour session provides an update on the latest COVID-19 financial guidance, a focus on the phase 3 planning requirements for the second half of the 20/21 financial year, and a view of 21/22, followed by a technical Q&A session.  | Online   | 1                    |
| <b>Target:</b> Senior managers in the NHS finance function   |  |          |                      |
| <b>25 Sept</b><br>09:30 – 12:30                              | <b>Masterclass: Time management to maximise performance</b><br>The secret to managing your time effectively is knowing what you want to do and when you will do it. However, this is much easier said than done, especially when faced with remote working. This half day course will provide you with key tips on how to stay proactive and in "execute" mode to maximise your performance. | Online   | 3                    |
| <b>Target:</b> NHS finance and procurement professionals     |  |          |                      |
| <b>1 Oct</b><br>09:00 – 12:30                                | <b>Skills development: Business cases</b><br>This engaging and practical half day workshop is a must for NHS professionals who would like to build, write, and present their business case effectively and with confidence.  | Online   | 2                    |
| <b>Target:</b> NHS finance and procurement professionals     |  |          |                      |
| <b>15 Oct</b><br>09:00 – 12:30                               | <b>Skills Development: Communicating online effectively</b><br>We are now having to deliver everything online - from one-to-one conversations and team meetings to external communications. But how effective are we? Are people hearing what we are saying—let alone acting on it? How does online communication differ to offline communication?   | Online   | 2                    |

**Target:** Those who want to make sure their voice is getting heard remotely

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|--|--|--------|---|
| <b>5 Nov</b><br>10:00 –<br>15:00   | <b>Masterclass: Advanced Influencing and Negotiating</b><br>This highly interactive one-day module will provide the opportunity for you to develop effective and strategic influencing and negotiating skills  | Online | 3 |
| <b>Target:</b> Senior finance/procurement managers and deputy Directors  |  |        |   |
| <b>10 Nov</b><br>09:00 –<br>12:30  | <b>Masterclass: Successfully managing and leading change</b><br>All organisations whatever sector need to change and adapt. The NHS is no exception. Yet successfully delivering change can be challenging. If you are to get better at leading and managing change this workshop is for you.  | Online | 3 |
| <b>Target:</b> Those who want to get better at leading and managing change   |  |        |   |
| <b>17 Nov</b><br>09:30 –<br>12:30  | <b>Skills Development: Building a Modern Finance Function</b><br>This interactive session will explore the opportunities that have been revealed as a result of the learning from COVID 19. The session will discuss ways in which this learning can be applied to help build a finance function fit for the future. This session will offer the chance for rich debate. | Online | 2 |
| <b>Target:</b> Senior managers in the NHS finance function   |  |        |   |
| <b>24 Nov</b><br>13:30 –<br>16:30  | <b>Skills development: Commercial Aspects for Procurement</b><br>This half day event provides an introduction to commercial aspects for procurement. During the course, you will learn about whole life costing, evaluation methodologies of techniques to maximise value and the factors that impact cost.  | Online | 2 |
| <b>Target:</b> Band 4 – 6  |  |        |   |
| <b>7 Jan</b><br>09:30 –<br>16:30   | <b>Skills development: Excel: Beyond the Basics</b><br>This one-day event will look at a wide range of features, functions and tricks to help you manage large and complex workloads, be more productive and save time.  | Online | 3 |
| <b>Target:</b> Regular Excel users with knowledge of building formulae, using operators, functions, absolute and relative referencing. |  |        |   |
| <b>11 Jan</b><br>13:00 –<br>14:30  | <b>CPD/technical: Overview of the NHS annual accounts (part 1)</b><br>This webinar will introduce financial reporting and why it is important. The bulk of the session will use a set of NHS annual accounts, to introduce the accounting concepts used in its   | Online | 1 |

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preparation as well as identifying some of the aspects of the accounts that are specific to the NHS

**Target:** Finance staff who are new to NHS accounts or want a refresher, also non-finance people who want to understand what is in the accounts.

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| <b>14 Jan</b><br>09:30 - 12:30   | <b>Skills Development: Managing and issuing and tender process</b><br>This highly constructive and interactive one-day programme gives understanding about tenders and their need, as well as addresses issues that are within the process. The course also covers effective skills and techniques to make your tender work for you, and to get the best deal out of the bidders | Online | 3                  |
| <p><b>Target:</b> NHS Finance and Procurement professionals and those who would like to know more about tendering and the tendering process.</p> |  |        |                    |
| <b>20 Jan</b><br>10:30 - 14:00   | <b>CPD/technical: Introduction to NHS costing</b><br>The event will provide delegates with an introduction to the changing role of costing in the NHS, the Costing Transformation Programme (CTP) and the importance of accurate costing information to the wider NHS.   | Online | 1                  |
| <p><b>Target:</b> New to costing or those who will benefit from an overview of costing in the NHS</p>  |  |        |                    |
| <b>21 Jan</b><br>09:30 - 16:00   | <b>CPD/Technical: Developing Talent Student conference</b><br>The one-day conference will provide a mix of plenary and workshop sessions. There will also be plenty of opportunity to network with other finance students and newly qualified colleagues from across the regions.  | Online | 1                  |
| <p><b>Target:</b> Finance staff who are currently studying, have recently qualified or are about to embark on an accountancy qualification</p>   |  |        |                    |
| <b>2 – 3 Feb</b><br>2 days   | <b>Developing Talent Module 1: Self Awareness</b><br>This two-day module will help you to gain greater personal insight into the capability of “Self-Awareness”. It aims to enhance the management and leadership skills of participants and provides extensive opportunities for personal development.  | Online | 15 for all modules |
| <p><b>Target:</b> Senior finance/procurement managers and deputy directors</p>   |  |        |                    |
| <b>10 Feb</b>  | <b>Skills Development: Project Management</b><br>This session goes beyond the tools of project management and is aimed at increasing a PM's "soft" skills. The session will teach you to engage and work more effectively, and use your skills, knowledge and leadership capabilities to get better results; rather  | Online | 3                  |

than spending all their time creating schedules, managing risks, issues and changes.

**Target:** Finance and procurement professionals with a project management element to their role

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|---|--|---------------|---------------------------|
| <p><b>16 Feb</b><br/>13:00 – 14:30</p>  | <p><b>CPD/technical: Overview of the NHS annual accounts (part 2)</b><br/>This session will build on the first session and consider parts of the annual accounts in more detail. It will cover issues such as the valuation of property, plant and equipment and going concern.</p>  | <p>Online</p> | <p>1</p>                  |
| <p><b>Target:</b> Finance staff who are new to NHS accounts or want a refresher, also non-finance people who want to understand what is in the accounts.</p>  |  |               |                           |
| <p><b>18 Feb</b></p>  | <p><b>Skills Development: Excel: Power BI tools including Pivot Tables</b><br/>This one-day event is a content rich, intense course which allows you to learn about the PowerPivots tools, Power Business Intelligence (Power BI) and includes an introduction into adding a PowerView perspective. Therefore, this is the perfect 'add-on' to our Excel Above &amp; Beyond course</p> | <p>Online</p> | <p>3</p>                  |
| <p><b>Target:</b> Aimed at delegates with a high level of experience using Excel and Pivot Tables combined with an understanding of relational data bases.</p>  |  |               |                           |
| <p><b>25 Feb</b><br/>09:30 - 15:30</p>  | <p><b>Developing Talent Module 2: Communication and Influence</b><br/>A practical, interactive one-day module that will provide an insight into understanding how other people 'tick' and provide the opportunity to explore how you can enhance your own capability in communicating with others.</p>   | <p>Online</p> | <p>15 for all modules</p> |
| <p><b>Target:</b> Senior finance/procurement managers and deputy directors.</p>   |  |               |                           |
| <p><b>4 Mar</b><br/>10:00 - 13:00</p>   | <p><b>CPD/technical: Dynamic Purchasing Systems course</b><br/>This half day course is designed to provide delegates with an understanding of the requirements for awarding compliant frameworks agreements and DPSs. In addition, the regulatory requirements.</p>  | <p>Online</p> | <p>1</p>                  |
| <p><b>Target:</b> Procurement practitioners, contract managers, compliance managers and operational stakeholders, who need to understand the legal requirements in respect of the awarding compliant frameworks and DPS, and effectively calling contracts in a legal manner via these methods.</p> |  |               |                           |

|                                |   |          |                    |
|--------------------------------|---|----------|--------------------|
| <b>17 Mar</b><br>13:00 – 14:30 | <b>CPD/technical: Year-end accounting issues 2020/21</b><br>This session will consider the specific accounting issues for 2020/21, it will cover issues such as the impact of Covid-19 on the accounts, IFRS 16 leases and consolidation of NHS charities as well as other issues identified during the financial year<br><br><b>Target:</b> Finance staff who are preparing the NHS accounts for 2020/21 | Online   | 1                  |
| <b>5 May</b>                   | <b>Developing Talent Module 3: Developing people through coaching</b><br>A one-day course which will enhance your ability to motivate, develop and empower others.<br><br><b>Target:</b> Senior finance/procurement managers and deputy directors.  | Bristol  | 15 for all modules |
| <b>11-12 May</b><br>2 days     | <b>Masterclass: 'Mini' Developing Talent</b><br>This two-day programme will offer you the chance to focus on personal and staff motivation under pressure. You will learn how to build on your strengths to build self-esteem and confidence in yourself and your colleagues, raise your self-awareness and understand the impact you have on others.<br><br><b>Target:</b> Bands 5 – 7                   | Bristol  | 5                  |
| <b>19 May</b>                  | <b>Masterclass: Strategic Thinking</b><br>This online session will equip you to think more effectively in the longer term and consider how you can maximise current opportunities to create sustainable change.<br><br><b>Target:</b> Senior finance/procurement managers and deputy Directors  | Taunton  | 5                  |
| <b>25 May</b>                  | <b>Skills Development: Excel - Above and Beyond</b><br>This one-day event will look at advanced features of Excel, including techniques for nesting formulae using a variety of functions. You will learn more features in Conditional Formatting, What-If analysis tools and managing workbooks more effectively.<br><br><b>Target:</b> High level users of Excel, band 7 and above                      | Plymouth | 3                  |
| <b>8 June</b>                  | <b>Skills Development: Contract Management</b><br>This half day event will provide an understanding of contract terms, management tools, risk management, service delivery and supplier relationships or a full one-day event which delves deeper and offers more practical application via group exercises and tutor facilitated feedback.<br><br><b>Target:</b> Procurement professionals               | Online   | 3                  |

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|----------------|---|---------|--------------------|
| <b>9 June</b>  | <b>Developing Talent Module 4: Leading Change VIP</b><br>This module will be a highly interactive section of the programme which will investigate the impact of having clear purpose and how to engage the hearts and minds of your people. Broadly we will cover Vision, Infrastructure and People.<br><br><b>Target:</b> Senior finance/procurement managers and deputy directors.                                  | Exeter  | 15 for all modules |
| <b>15 June</b> | <b>FSD/PSD Leads meeting</b><br>Regional updates, programme planning and networking   | Exeter  | 0                  |
| <b>15 June</b> | <b>Building a resilient and enduring organisation</b><br>No organisation is going to emerge from the COVID-19 pandemic the same, they will either be stronger or weaker. And while organisations have little to no control over much of the fallout of the pandemic, there are still things that any organisation can do to build a stronger, more resilient, and enduring organisation<br>Free to all FSD/PSD leads. | Exeter  | 5                  |
| <b>8 July</b>  | <b>Developing Talent Module 5: Taking action, making it happen</b><br>In the final module, you will reflect on your strengths and development areas. Through robust and objective peer challenge you will identify one or two areas to take back to your organisation for further development.<br><br><b>Target:</b> Senior finance/procurement managers and deputy directors   | Bristol | 15 for all modules |
| <b>13 July</b> | <b>CPD/technical: Introduction to NHS Finance</b><br>Delegates will gain an understanding of NHS finance terminology, how the NHS is financed, how funds flow through the NHS and an introduction to NHS costing.<br><br><b>Target:</b> Those wishing to understand how money flows around the NHS  | Exeter  | 1                  |
| <b>21 July</b> | <b>Skills Development: Guiding your career and gaining confidence</b><br>Deciding what route to take in your career is a daunting prospect. In this workshop, we will explore the career paths available through NHS Finance and provide you with the tools and techniques to help you decide.<br><br><b>Target:</b> Band 6 – 8a  | Taunton | 3                  |

# HFMA bitesize short courses

We have been able to provide the South West SDN (FSD/PSD) access to the collection of the HFMA bitesize short courses, as we are unable to run the introduction to NHS finance event in person. This provides 5 individuals in your organisation with access to bitesize short courses, a list of which can be found below. Each individual course is equivalent to 3 hours of accredited CPD.

Please note there are only 5 spaces per organisation available, priced at 1 credit per person. If you or a colleague would like to access the HFMA Bitesize short courses, please email [SW.SDN@hfma.org.uk](mailto:SW.SDN@hfma.org.uk) for admission.

**Please check if your organisation already has a subscription to the HFMA bitesize short courses before proceeding through SDN.**

The short courses can help your team develop their understanding of NHS finance and procurement including (but not limited to):

- NHS Finance: Gain an understanding of how the NHS in England is structured and financed
- NHS budgets: Examine how NHS budgets are prepared, used and managed
- NHS costing: Learn more about costing in the NHS and how it helps to deliver high quality services
- How NHS provider organisations are paid: Get an introduction to how money flows through the NHS and how it is used to pay for services
- Procurement in the NHS: Reflect on how NHS organisations buy goods and services
- NHS Governance
- NHS business cases
- NHS Capital Expenditure
- NHS commissioning
- NHS cost improvement programmes
- Integrated healthcare
- Internal and external audit

## Costing and value-based healthcare webinars

From 2020, organisations will now have access to the Healthcare Costing for Value Institute webinars, which cover topics such as PLICS, costing, value-based healthcare, waste and productivity. Details of the webinars will be released regularly throughout the year.

## Deputy Director of Finance Network

We are delighted to be hosting a Deputy Director of Finance Network. These meetings will provide an opportunity to hear regional updates, share best practice and network with your peers. Details of

these meetings will be released periodically throughout the year. For more information, contact [SW.SDN@hfma.org.uk](mailto:SW.SDN@hfma.org.uk).

## Coaching and mentoring

Everyone wants to progress in their chosen career and that can be easier with the support of a mentor. A HFMA mentor is a more experienced peer who is happy to share their knowledge of healthcare finance to support you. Our pool of qualified mentors are available to individual HFMA members completely free of charge. Their guidance, insight and support can help you to improve your knowledge and skills, develop a career plan and learn more about working in the field of healthcare finance. If you would like to discuss getting a mentor, please contact

[Anya.McGauley@hfma.org.uk](mailto:Anya.McGauley@hfma.org.uk).

## How to book onto an event

Please visit our website: [www.hfma.org.uk](http://www.hfma.org.uk)

- Click on the 'events' tab on the home page to view events
- Click on Finance Skills Development
- Sign into FSD (if you do not sign in, you will not be able to book onto an event)
- Click on events to view the events in your region
- To book onto an event, click 'book a place' button either 'for myself' or 'for a colleague'
- Your organisations FSD lead will receive an email asking them to accept or decline your request
- You will be notified via email if your place has been successful
- You will receive joining instructions least two weeks before the date of the event

*When you sign up to an event, we will share your name, job title and organisation with selected third-party organisations.*

## Contact us

For any event related enquiries, please email [SW.SDN@hfma.org.uk](mailto:SW.SDN@hfma.org.uk).

# Future-Focused Finance



Future-Focused Finance is about improving NHS finance for everyone; recognising the need for strong financial skills and understanding across all professional groups to deliver good patient care and value for taxpayers. This national initiative has been designed to improve the quality of finance teams and financial management across the NHS. Delivery is through a range of networks, frameworks and toolkits, as well as events, workshops and other learning and development opportunities.

In 2018, the Finance Leadership Council refreshed their strategic aim and objectives. This means, with the support of the Finance Development Foundation and Skills Development Network, we're working to develop a diverse, appropriately skilled, adaptable and resilient finance function and workforce, to ensure value for money and quality services for patients.

Work is developed under five delivery themes; each is supported by committed finance leaders from among the NHS:

- Culture
- Workforce and Leadership
- Engagement and Development
- Efficiency and Value
- Adapting to System Change

## Talent Management and development opportunities through SDN and FFF

The Skills Development Network and FFF are working in together to ensure there are suitable development opportunities if you want to become a senior finance leader.

Through Skills Development you can begin your journey with the mini Developing Talent programme aimed at bands 3-5, moving onto the full Developing Talent Programme for bands 7 upwards. These are then steppingstones to move into the FFF programmes and networks which offer development opportunities for those working at Band 8B and above including programmes for new in post FD/CFOs and development programmes for existing FDs. Further information on all of the FFF programmes can be found on the [website here](#).

## FFF towards excellence

The FFF Towards Excellence accreditation system is designed to allow the NHS Finance Leadership Council (FLC) to give due recognition to those NHS organisations that have the very best finance skills development culture and practices in place. It is based on a simple self-assessment process.

There are three levels within the process. They reflect the continuous development of the organisation's finance function, with level three recognising the highest standards of financial competence and commitment to the skills development of the finance team. Level 1 will be achieved through a process of self-assessment with verification from the organisation's Finance Director. Levels 2 & 3 will require peer-assessment by colleagues from another NHS organisation. Each accreditation lasts for a period of three years and will then require reaccreditation.

For further information on the process, including the evidence schedule proformas, please visit the [FFF website](#).

# About the HFMA

The Healthcare Financial Management Association (HFMA) is the professional body for finance staff working in healthcare. For 70 years it has provided independent support and guidance to its members and the wider healthcare community.

It is a charitable organisation that promotes the highest professional standards and innovation in financial management and governance across the UK health economy through its local and national networks. The association analyses and responds to national policy and aims to exert influence in shaping the healthcare agenda. It also works with other organisations with shared aims in order to promote financial management and governance approaches that really are 'fit for purpose' and effective.

The HFMA is the biggest provider of healthcare finance and business education and training in the UK. It offers a range of qualifications in healthcare business and finance at undergraduate and postgraduate level and can provide a route to an MBA in healthcare finance. The association is also an accredited provider of continuing professional development, delivered through a range of events, e-learning and training. In 2019 the HFMA was approved as a main training provider on the Register of Apprenticeship Training Providers and will be offering and developing a range of apprenticeships aimed at healthcare staff from 2020.