



West Midlands Skills Development
Improving finance and procurement skills
across the NHS



Finance and Procurement Skills Development Network

2020/21 programme

West Midlands



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.

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 the inability to run face-to-face events safely, we can offer the region access to the whole suite of HFMA bitesize short courses (5 per organisation only). More information on the short courses can be found on the HFMA website.

Developing talent programme

A five-module leadership programme for senior finance and procurement professionals in the NHS.

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.

WM 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
24 Apr	West Midlands Director of Finance meeting	Online	0
26 June	West Midlands Deputy Director of Finance meeting	Online	0
3 July	West Midlands Director of Finance meeting	Online	0
All year	HFMA bitesize short courses Due to restrictions on social gatherings, in 2020 WM 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. Contact fleur.sylvester@hfma.org.uk for more information.	Online	1 (max 5 per org)
Target: All NHS finance and procurement professionals			
9 July ½ Day AM	Masterclass: Building high performance virtual teams This session will teach line managers how to build synergy, cohesion and understanding across a remote team. Learn how to facilitate remote meetings and maximise performance.	Online	2
Target: Those with management responsibilities			
14 July 12:30 – 14:30	CPD/technical COVID 19 update This 2-hour session will cover a number of key themes, including the next steps on the NHS response to COVID-19 based on the most up to date guidance.	Online	1
Target: All finance staff including Deputy Director of Finance			
23 July ½ Day PM	Masterclass: Resilience during periods of change and uncertainty Through this time of uncertainty, our resilience is being tested more than ever. This workshop will discuss how change affects individuals, provide techniques to help you tune into behaviour, thoughts, feelings and help you navigate through change. You will learn how to recognise trigger points and discover coping strategies for a remote environment.	Online	2
Target: All finance and procurement professionals			

11 Sept	West Midlands Director of Finance meeting	Online	0
16 Sept 09:30 – 16:15	CPD/technical: Level 1 – VAT refresher This course will focus on contracted-out services and VAT recovery, provide a refresher of the basic rules and go through what can and cannot be recovered under each of the main headings. We will review common errors, invoices checked and picked up on HMRC inspections, changes and overseas transactions. Target: Those new to the NHS or requiring a VAT refresher	Online	1
22 Sept 14:00 – 15:00	Masterclass: Personal impact This interactive half day workshop will focus on developing your communication skills by exploring various aspects of personal impact and making a positive lasting impression. Target: Those hoping to enhance their personal impact	Online	3
25 Sept	West Midlands Deputy Director of Finance meeting	Online	0
29 Sept 09:30 – 16:15	CPD/technical: Level 2 - VAT in the NHS (Intermediate) This strategic event will cover income, including VAT liability, cash income, salary deductions, debtors invoices. Capital & Estates to examine where there is scope for VAT recovery and procurement and budget control for buyers and purchasers to ensure maximum recovery on purchases. Target: Intermediate VAT	Online	1
6 Oct 10:00 – 12:30 Q&A 13:00 – 15:00	Skills Development: Category Management This course is intended for people who wish to understand and apply the tools/techniques/processes, either so that they can initiate Category Management within their organisation as appropriate, or work within an established system and contribute more fully to it Target: Band 4 and above	Online	2
7 Oct 09:00 – 12:30	Masterclass: Strategic Thinking This online module will help to equip you to think more effectively in the longer term and consider how you can maximise current opportunities to create sustainable change. Target: Senior finance/procurement managers and deputy Directors	Online	3
13 Oct	Skills Development Excel Beyond the basics This comprehensive 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

Target: Regular Excel users with knowledge of building formulae, using operators, functions, absolute and relative referencing.

21 Oct ½ Day	Masterclass: Moving into leadership and management Moving from a technical role into a managerial position can be a daunting experience. This course has been developed for those looking to step into a management role or leadership role which involves heading up a team of people.	Online	3
Target: Bands 6 and above			
27 Oct 10:00 – 15:00	Masterclass: Advanced Influencing and Negotiating This highly interactive one-day online module will provide the opportunity for you to develop effective and strategic influencing and negotiating skills	Online	3
Target: Senior finance/procurement managers and deputy Directors			
10 Nov 10:00 – 12:30 Q&A 13:00 – 15:00	Skills development: Commercial Aspects for Procurement 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
Target: Band 4 – 6			
12 Nov 9:30 - 11:00	Skills development: Excel online – Pivot Tables A pivot table is a powerful Excel tool that is used to summarise, sort and reorganise, group, sound total or average data stored in an Excel worksheet. This 90-minute session will teach you about how to use a pivot table.	Online	1
Target: Regular Excel users with a sound knowledge of building formulae, using operators, functions, absolute and relative referencing			
12 Nov 11:45 – 1:15	Skills Development: Excel online – Using logic and lookup functions with range names This module covers how to use nested IF statements combined with other Logical functions, including AND OR. Combined with using Lookup functions including VLOOKUP, HLOOKUP and MATCH INDEX.	Online	1
Target: Regular Excel users with a sound knowledge of building formulae, using operators, functions, absolute and relative referencing			

12 Nov 2:30-4:00	Skills Development: Excel online – Sorting, filtering, grouping, subtotalling and data consolidation This module incorporates sorting and filtering data within the Tables feature within Excel with lots of tips and tricks. You will also learn how to consolidate data from different workbooks easily. Target: Regular Excel users with a sound knowledge of building formulae, using operators, functions, absolute and relative referencing	Online	1
25 Nov 09:30 - 12:30	Masterclass: Time management to maximise performance 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. Target: NHS finance and procurement professionals	Online	3
27 Nov	West Midlands Deputy Director of Finance meeting	Birmingham	0
11 Dec	West Midlands Director of Finance meeting	Birmingham	0
7-8 Jan 2 days	Masterclass: ‘Mini’ Developing Talent 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. Target: Bands 5 – 7	Birmingham	5
11 Jan 13:00 – 14:30	CPD/technical webinar: Overview of the NHS annual accounts (part 1) 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 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, and non-finance people who want to understand what is in the accounts.	Online Webinar	1
19 Jan	Skills development: Excel: Above and Beyond This one-day event will look at advanced features of Excel, including techniques for nesting formulae using a variety of	Birmingham	3

functions. You will learn more features in Conditional Formatting, What-If analysis tools and managing workbooks more effectively.

Target: High level users of Excel, band 7 and above

20 Jan	CPD/technical: Introduction to NHS costing 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.	Manchester	1
	Target: New to costing or those who will benefit from an overview of costing in the NHS		
21 Jan	CPD/Technical: Developing Talent Student conference 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.	Bristol	1
	Target: Finance staff who are currently studying, have recently qualified or are about to embark on an accountancy qualification		
25 - 26 Jan	Developing Talent Module 1: Self Awareness 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.	Birmingham	15 for all modules
	Target: Senior finance/ procurement managers and deputy directors		
3 Feb	Skills Development: Excel: Power BI tools including Pivot Tables 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.	Birmingham	3
	Target: Aimed at delegates with a high level of experience using Excel and Pivot Tables combined with an understanding of relational data bases.		
9 Feb	FSD/PSD leads meeting Regional updates, programme planning and networking	Birmingham	0
9 Feb ½ day PM	Masterclass: Building better professional relationships Session details tbc. Free to FSD/PSD leads	Birmingham	5

Target: All finance and procurement professionals

16 Feb 13:00 – 14:30	CPD/technical webinar: Overview of the NHS annual accounts (part 2) 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 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.	Online webinar	1
18 Feb	Skills Development: Agile project management You will learn the essential theory and process of agile project management and have ample opportunity to practice in workshop simulations. You'll learn the behaviours that will transform your projects and by the end of the course you will have the confidence and tools to be successful as a project team member and leader. Target: Those looking to develop their project management skills	Birmingham	3
23 Feb	Skills Development: Excel: Beyond the Basics This comprehensive 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. Target: Regular Excel users with knowledge of building formulae, using operators, functions, absolute and relative referencing.	Birmingham	3
24 Feb	Developing Talent Module 2: Communication and Influence 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. Target: Senior finance/procurement managers and deputy directors.	Birmingham	15 for all modules
2 Mar	Skills Development: Business cases This engaging and practical one-day workshop is a must for NHS professionals who would like to build, write, and present their business case effectively and with confidence. Target: NHS finance and procurement professionals	Birmingham	3
4 Mar	Skills Development: Excel - Above and Beyond 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.	Birmingham	3

Target: High level users of Excel, band 7 and above

17 Mar 13:00 – 14:30	CPD/technical: Year-end accounting issues 2020/21 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 Target: Finance staff who are preparing the NHS accounts for 2020/21	Online	1
4 May	Developing Talent Module 3: Developing people through coaching A one-day course which will enhance your ability to motivate, develop and and empower others. Target: Senior finance/ procurement managers and deputy directors.	Birmingham	15 for all modules
8 June	Developing Talent Module 4: Leading Change VIP 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. Target: Senior finance/ procurement managers and deputy directors.	Birmingham	15 for all modules
6 July	Developing Talent Module 5: Taking action, making it happen 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. Target: Senior finance/ procurement managers and deputy directors.	Birmingham	15 for all modules

HFMA bitesize short courses

We have been able to provide the West Midlands 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 fleur.sylvester@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

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.

How to book onto an event

Please visit our website: 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. For further information, please view our privacy policy on the HFMA website.

Contact us

For any SDN enquiries, please contact us via email on WM.SDN@hfma.org.uk or call 0117 929 4789.

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.