



NHS West Midlands Finance Skills Development

2016-17 Annual Review

This report is published on behalf of the West Midlands Finance Skills Development (FSD) Board and provides an update on FSD related activities that have taken place in the region during the 2016-17 financial year.

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1. Introduction

The 2016 –17 West Midlands Programme has been very well received across the region with record numbers of CPD hours logged and credits used by organisations.

Following a successful fourth year with HFMA delivering the West Midlands FSD Programme the 16-17 programme was aimed to build on foundations from previous FSD programmes, introduce beneficial new initiatives and continue to tailor for the specific needs of the local finance and non-finance workforce.

2. Programme Delivery

(i) Credit System

FSD Leads are responsible for approving or declining all applications made by colleagues to attend FSD courses / events, and are able to view reports at any time showing which colleagues have attended and how many credits their organisation has remaining.

The use of the pooled credit system, which was put in place in 2013-14, to accommodate the re-structure, has continued into the current year. Credits for commissioning organisations are pooled under the Area Teams instead of being allocated out to each organisation, in order to accommodate the wider distribution of finance staff in these organisations.

Annual Credit Allocation 2016-17:

Providers	
Level 1 & 2	60
Level 3	50
Level 4	35
Level 5	15
Commissioners	
Level A	80
Level B	50
Level C	25
Level D	10
Level E	5

Credit usage opportunities 2016 -17:

Event category	1 X delegate place =
FSD Leads Network meetings	0 credits
Director of Finance meetings	0 credits
Deputy Director of Finance meetings	0 credits
CPD/Technical Seminars	1 credit
Introduction to NHS finance	1 credit
Finance for non-finance/NED programmes	1 credit
Finance and Skills Development workshops	3 credits
Master Classes (half day)	3 credits
Master Classes (full day)	5 credits
Developing Talent Programme	18 credits for 7 Modules (or 5 credits per individual module)

(ii) Credit Usage Report

WM FSD Programme 2016/17 Final Credit Report

Organisation	Level	Credits 16-17	Credits Remaining	% used
NHS Midlands and Lancashire CSU	B	25	0	100%
The Shrewsbury and Telford Hospital NHS Trust	B	60	1	98%
NHS Birmingham Cross City CCG	B	25	1	96%
George Eliot Hospital NHS Trust	D	35	2	95%
Birmingham Children's Hospital NHS Foundation Trust	A	60	3	95%
Dudley and Walsall Mental Health Partnership NHS Trust	C	50	3	94%
Black Country Partnership NHS Foundation Trust	C	50	3	94%
South Staffordshire and Shropshire Healthcare NHS Foundation Trust	A	60	5	92%
NHS England Midlands and East (Birmingham) and Regional Specialised Commissioning	B	60	5	92%
The Dudley Group NHS Foundation Trust	A	30	3	90%
University Hospitals of North Midlands NHS Trust	A	60	7	89%
Heart of England NHS Foundation Trust	A	60	13	79%
West Midlands Ambulance Service NHS Foundation Trust	D	35	9	75%
Worcestershire Acute Hospitals NHS Trust	B	60	16	73%

Birmingham Women's NHS Foundation Trust	C	50	15	70%
Staffordshire and Stoke on Trent Partnership NHS	A	60	18	70%
The Robert Jones and Agnes Hunt Orthopaedic Hospital NHS Foundation Trust	C	50	15	70%
Sandwell and West Birmingham Hospitals NHS Trust	B	60	21	65%
University Hospitals Coventry and Warwickshire NHS Trust	B	60	21	65%
Wye Valley NHS Trust	C	50	20	60%
Birmingham Community Healthcare NHS Trust	B	60	25	58%
Worcestershire Health and Care NHS Trust	A	60	27	55%
NHS England West Midlands	B	205	95	54%
NHS Herefordshire CCG	C			
NHS Coventry & Rugby CCG	B			
NHS Warwickshire North CCG	D			
NHS Redditch & Bromsgrove CCG & Wyre Forest CCG	C			
NHS Solihull CCG	C			
NHS Wolverhampton CCG	C			
NHS Dudley CCG	C			
NHS Sandwell and West Birmingham CCG	B			
NHS Walsall CCG	B			
NHS South Worcestershire CCG	C			
NHS Birmingham South Central CCG	C			
South Warwickshire NHS Foundation Trust	A	60	29	52%
Burton Hospitals NHS Foundation Trust	C	50	25	50%
Walsall Healthcare NHS Trust	B	60	37	38%
Shropshire Community Health NHS Trust	C	50	32	36%
Coventry and Warwickshire Partnership NHS Trust	C	50	34	32%
NHS Arden and Greater East Midlands Commissioning Support Unit	A	80	70	23%
NHS England North Midlands (Shropshire and Staffordshire)	B	110	86	22%
North Staffs Stoke-on-Trent CCGs	D			
NHS East Staffordshire CCG	D			
NHS South East Staffs and Seisdon & Peninsula CCG	D			
NHS Telford & Wrekin CCG	D			
North Staffordshire Combined Healthcare NHS Trust	C	50	39	18%
The Royal Wolverhampton NHS Trust	B	60	53	12%

(iii) Event Programme

The 2016-17 FSD Programme aimed to deliver a menu of development opportunities for finance and non-finance staff within NHS West Midlands in line with the 16-17 Action Plan and additional feedback collated throughout the year. The table below gives an overview of delegate feedback, credit usage, CPD hours and attendance.

West Midlands Finance Skills Development Programme Feedback 2016-17

Date	Event	Feedback		Written delegate feedback	Attendance	CPD hours	Credits used
		% Excellent	% Good				
2016/17 18 th May	Excel and PowerPoint Course	33%	67%	<ul style="list-style-type: none"> • Very Informative • Perhaps less PowerPoint and more Excel? 	10 (10)	8 (80)	30
24 th May 2016	CPD/Technical: <i>NHS VAT Training Day</i>	67%	33%	<ul style="list-style-type: none"> • The presentation was involving and excellently explained • Detailed and useful to take away and refer back to • Interesting and well presented • Very informative and interactive – learnt a lot! Would recommend to others 	16 (25)	7 (112)	16
25 th May 2016	Master Class: <i>Effective Business Partnering</i>	50%	50%	<ul style="list-style-type: none"> • Empowered me as an individual to do the role and step outside of own 'comfort zone' • Great course, delivered very well and would highly recommend to colleagues • I enjoyed the course and definitely learnt new things. I have a lot to take back with me 	20 (25)	7.5 (150)	100
22 nd June 2016	Finance and Skills Development: Moving to the Next Level	50%	50%	<ul style="list-style-type: none"> • Well worth attending • Good variety of speaking/listening and interactive activities • Very well presented • Good ideas and techniques to try and use going forward 	21 (30)	7 (147)	63
19 th & 20 th July 2016	Developing Talent: Module 1	100%		<ul style="list-style-type: none"> • Brilliant – more people should attend this • Look forward to next session 	23 (35)	7.5 (172.5)	414 (for 7)

				<ul style="list-style-type: none"> Really pleased with the first module Great enthusiasm - made the course fun 			module s)
20 th July 2016	Excel Course: Beyond the Basics	86%	14%	<ul style="list-style-type: none"> Please can we have more of these excel courses – very useful and relevant? I will recommend to colleagues Extended training to include exercises More courses available Very well presented and informative session 	11 (10)	7.5 (82.5)	33
13 th September 2016	Developing Talent: Module 2 Communication	83%	17%	<ul style="list-style-type: none"> Really good course – very enjoyable and kept me engaged Presentation tips were good Fun but informative and helpful throughout 	21 (35)	8 (168)	As above
15 th September	CPD/Technical: Introduction to NHS Finance	79%	21%	<ul style="list-style-type: none"> Great course, delivered goals Found out a lot of useful information Content was excellent 	31 (60)	7 (217)	31
21 st September 2016	Finance for Non-Finance: Introduction to NHS Finance and Budgeting	50%	36%	<ul style="list-style-type: none"> The presenter made a complicated and 'dry subject' easily accessible and comprehensible. I would recommend to anyone Excellent course and content, delivered in an engaging and entertaining style. I really enjoyed the day Great day! 	19 (20)	7 (133)	19
30 th September	Master Class: Work/Life Balance: Mindfulness	64%	36%	<ul style="list-style-type: none"> Really good workshop Course content was better than expected Interesting and thought provoking 	11 (30)	6 (66)	33
6 th October 2016	Developing Talent: Module 3	86%	14%	<ul style="list-style-type: none"> Really useful, practical examples. Excellent! Great role play exercises in the day Enjoyable day! I picked up some useful skills and concepts that I can apply at work, good fun 	15	8 (120)	As above
11 th & 12 th October 2016	Finance and Skills Development: 'Mini' Developing Talent	92%	8%	<ul style="list-style-type: none"> Wonderful – no improvements needed One of the best events I have attended An enjoyable and thought provoking couple of days 	37 (35)	14 (518)	185

13 th October 2016	Student Conference	50%	50%	<ul style="list-style-type: none"> • Anthony Grills was inspirational • Great to hear from a patient and how the work we do makes his treatment possible • Loved Steve Bustin's presentations on presenting! Some really good ideas to take back to work for use in presentations 	28 (60)	7 (196)	28
9 th November 2016	Excel: Excel Above Beyond	71%	29%	<ul style="list-style-type: none"> • Covered a lot of elements that can be used back at the office • Very, very helpful • Really interesting day, good workbooks for examples 	10 (10)	8 (80)	30
10 th November 2-16	CPD/Technical: Business Cases	42%	58%	<ul style="list-style-type: none"> • Very informative. Thank you Pete and HFMA • Really enjoyed the interactive group exercise, good way of learning • Very informative and all key points were covered as well • Great materials and great knowledge 	32 (35)	8 (256)	32
23 rd November 2016	Developing Talent: Module 4	72%	28%	<ul style="list-style-type: none"> • Really interesting and very useful course. I would highly recommend • Excellent as always 	20 (35)	8 (160)	As above
11 th January 2017	Developing Talent: Module 5	83%	17%	<ul style="list-style-type: none"> • Fantastic useful session – loved volunteer idea & shared vision/purpose 	18 (35)	8 (160)	As above
7 th February 2017	CPD/Technical: Finance Training at the Forefront			<ul style="list-style-type: none"> • 			
8 th February 2017	Developing Talent: Module 6			<ul style="list-style-type: none"> • 			
21 st February 2017	Excel: Beyond the Basics			<ul style="list-style-type: none"> • 			
23 rd February 2017	Excel: Above and Beyond			<ul style="list-style-type: none"> • 			

22 nd February 2017	Developing Talent: Module 7			•			
28 st February 2017	Master Class: Project Management			•			

3. Assessing and Identifying Local Training & Development Needs

During 2016-17 HFMA has worked closely with a number of regional panels to ensure we are providing a programme that accurately addresses the needs of the local NHS workforce. Guidance and feedback has been sought through:

- FSD Leads meetings – conducted in February and September 2016.
- An online FSD Leads feedback survey on programme satisfaction and delivery – sent out before the February 2016 Leads meeting and consequently used as a source of discussion for the 2016-17 Programme. A further survey will be sent out in advance of the February 2017 FSD Leads meeting to feed into the 2017-18 Programme.
- Presentations on progress at the bi-monthly West Midlands Finance Director meetings, with the opportunity for FDs to influence and feedback.
- FSD Board meetings.
- Updates on progress at the HFMA WM Branch Committee meetings.
- Regular discussions with other FSD regions to identify best practice which could be applied to the West Midlands

The on-going programme objective is to support staff through all stages of their careers and provide access to a range of development opportunities in the following areas:

- Lifelong learning/CPD/professional and technical finance skills development.
- Leadership/career development and talent management.
- Finance for non-finance professionals and NED development.
- Professional education and qualifications.
- Partnership working/benchmarking/strengthening financial governance.

The feedback received and the involvement of local NHS finance professionals in the programme development has enabled HFMA to implement a number of new initiatives in 16-17 and to also identify clear targets for next year, which are further outlined in the 17-18 Action Plan.

4. Current Initiatives for 17-18

A strong focus for the 17-18 programme will be to increase the support given to FSD Leads in order for them to better govern the credit usage and training distribution within their organisations.

Consequently the following initiatives will continue to be implemented from April 17:

- ✓ Event marketers are sent out on a regular basis providing details for events and instructions for booking. monthly email updates are sent to FSD Leads providing an on-going overview of live events, booking deadlines, places available and credit usage. This aims to aid the FSD Leads in managing booking availability, particularly in the case of popular workshops which reach maximum capacity quickly.
- ✓ All events for the entire annual programme will be online and available to book from 1st April onwards. This aims to ensure delegates do not miss out on booking and allows events to be booked on a first-come-first-serve basis and enabling organisations to plan ahead for their colleague's annual training.
- ✓ In 2015 HFMA developed a new website which incorporates the FSD booking system and other resources previously provided by the FSD Network site. The website was launched on 1st April 2015

and provides greater value for money and a central hub for Healthcare Finance Information and Development.

- ✓ Several modules from the West Midlands Developing Talent Programme are now available to book individually. Enabling those who are unable to commit to 7 modules to attend modules 2, 4, 5 and 6 on a one-off basis. Some of the modules that were previously 2 days have been condensed to one day enabling those who are unable to commit to 2 consecutive days out of the office.
- ✓ The WM FSD Board will be looking to implement the FFF Kitemark which is an accreditation system designed to give due recognition to those NHS organisations that have the very best finance skills development culture and practices in place. We hope to implement this during the 2017/18 programme.

5. Organisational Contributions for 2017-18

The annual contributions are set out to cover the following costs incurred by HFMA:

- Programme costs
- Staff salaries
- Management costs
- Other costs including office overheads e.g. printing, stationery, electronic support, telephone, staff expenses and general costs associated with contract e.g. support from finance, marketing etc.

Organisations contribute on an annual basis according to the size and scope of the organisation, and the headcount of staff in-post working within the finance function.

The commissioner costs have been based on groups of organisations under each Area Team to reflect the credit distribution.

Organisation	
Levels 1 and 2: All Trusts with a turnover of £150m plus Band 4 Ambulance Trusts	£7,800
Level 3: All Trusts with a turnover of £30-£150m Band 3 Ambulance Trusts Audit agencies	£6,750
Level 4: All Trusts with a turnover below £30m Band 2 Ambulance Trusts	£5,075

Level 5: Health Education West Midlands and NHS England Regional Office	£2,175
Area Team Consortium:	
Level A: 40 and above finance staff - exclusive to CSUs	£9,200
Level B: 29 to 40 finance staff	£5,625
Level C: 10 to 29 finance staff	£3,250
Level D: 5 to 9 finance staff	£1,350
Level E: 0 to 5 finance staff	£700

6. FSD Programme/Action Plan 2017-18

2017 – 18 FSD Programme

The draft FSD Programme for 2017-18 will be reviewed by The FSD Board, Finance Directors and FSD Leads from the region.

The final 2017 –18 Programme and Action Plan will be circulated to local FDs and FSD Leads and available to view on the Finance Skills Development website from 1st April 2017.

FSD Board Members:

The West Midlands FSD Board is made up of the following members:

David Melbourne (Chair)	Birmingham Women's and Children's Hospital NHS Foundation Trust
Clare Hollingworth	Coventry & Rugby CCG
Giovanna Cooper	South Staffordshire and Shropshire Healthcare NHS Foundation Trust
Claire Finn	NHS England Specialised Commissioning
Kevin Stringer	The Royal Wolverhampton NHS Trust
Rob Pickup	Birmingham and Solihull Mental Health NHS FT
Jonathan Tringham	Burton Hospitals NHS FT
Steve Clarke	Health Education England
Paul Simpson	Cannock Chase/South East Staffordshire & Seisdon Peninsula/Stafford & Surrounds CCG's

The WM FSD Board and HFMA welcome any feedback and suggestions that you or your staff have regarding the FSD programme. If you have any questions regarding this report or in relation to FSD please contact:

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