

DECEMBER 2010

HFMA AWARDS 2010



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CELEBRATING BEST PRACTICE

The HFMA's immediate past president Paul Assinder highlights another year of outstanding achievement

THE HFMA AWARDS celebrate excellence in finance departments across the four home nations, showcasing best practice and achievement in financial management and governance. With the NHS facing unprecedented financial challenges across the UK, it has never been more important for the finance community to play a leading part in the process of change and these awards demonstrate finance professionals' capacity to rise to that challenge.

By showcasing the best of NHS finance, our awards aspire to highlight and spread best practice. Finance professionals have played a key role in raising their own standards – and the standards of financial management across their organisations generally – and it is important to celebrate this. While the public sector ethos is as strong in finance departments as it is in frontline services, the important work of these teams is all too often overlooked.

The future holds many challenges. The



economic climate means that future financial settlements for the NHS will be much tighter than in the last decade. However, the demand for further service improvement and enhanced quality is ever present. Quality, innovation, productivity and prevention, built on a solid base of good governance, will be the key to success and examples of best practice should be shared as widely as possible.

Now in its sixth year, the HFMA's Awards programme covers the fundamental aspects of the finance team role including the production of accounts, governance, training and development as well as the vital area of

efficiency. Our Awards also stress the importance of engaging clinicians in financial management and for the first time this year, the work of deputy directors of finance was also recognised.

The HFMA is acknowledged as 'the voice of healthcare finance' and I believe the awards ceremony at the HFMA annual conference is an opportunity for that voice to be heard. The event celebrates the contribution and success of finance teams before an audience of nearly 750 of your peers. I therefore commend these awards to you, and wholeheartedly join the applause for the winners' achievements. ■

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Steve Webster receives his award from Paul Assinder (left), David Flory and Public Sector Consultants chief executive Stephen Prince (right)

STAR PERFORMER

HFMA FINANCE DIRECTOR of the Year Steve Webster has been variously described by his chief executive as having ‘a brain the size of a planet’, displaying ‘boundless enthusiasm’ and being ‘the most competent and skilled finance director I have ever worked with’. But perhaps her further description of him – ‘incredibly modest’ – best captures the North Bristol NHS Trust finance director’s acceptance of the HFMA’s top individual award.

‘It really is unexpected – I didn’t think I would win. It is fantastic to be recognised in this way,’ he said. ‘It was a strong field and I was pleased to be chosen.’

As well as complimenting his fellow nominees, he paid tribute to the work of his department. ‘The whole finance team has been a vital part of what’s been achieved over the past few years at North Bristol.’

Mr Webster joined the trust as part of a turnaround team that was recruited to tackle a deficit of £45m in 2002/03; orchestrating the delivery of the financial recovery plan that has

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- **Winner** Steve Webster, North Bristol NHS Trust
- **Also shortlisted** Jeremy Cook, Barnet, Enfield and Haringey Mental Health NHS Trust; Keith Griffiths, Wrightington, Wigan and Leigh NHS FT; Nora Ann Heery, University of South Manchester NHS FT

ensured achievement of year-on-year financial balance and an increasing annual surplus to pay off the historic debt.

Ruth Brunt, the trust’s chief executive, said Mr Webster’s expertise has been invaluable in the planning of the trust’s new £500m private finance initiative building, which is due to open in 2014. Financial close was achieved earlier this year, despite the difficult market conditions.

He also overcame challenges associated with the introduction of international financial reporting standards, which meant the PFI scheme came on balance sheet, as well as accounting for accelerated depreciation. Solutions were found following extensive negotiations with local primary care trusts and the strategic health authority.

‘His wide knowledge and understanding of how hospitals function operationally and clinically has enabled him to contribute to the non-financial aspects of the scheme as well as leading the process for achieving financial close by February 2010. In affordability terms, the scheme will be one of the most cost effective in the UK,’ added Ms Brunt.

She also praised his support for maintaining the strength of the wider health economy, as a way of ensuring the trust’s long-term viability. This had gained him credibility with commissioners and their respect. Under his leadership, the organisation had adopted a collaborative, risk-sharing approach, focused on finding

WHAT THE JUDGES SAID

“Steve took a collaborative risk-sharing approach to identifying solutions to the financial challenges, and used his broader NHS knowledge to ensure that non-financial aspects were recognised”

innovative solutions to financial challenges, she added. This included initiating and leading a process for GPs and consultants to work together to identify interventions of low clinical value and agree referral management strategies.

The judges said the Finance Director of the Year Award had attracted a strong group of contenders from many types of NHS organisation. Most were supported by endorsements from boards, chief executives and chairs.

The judging criteria focused on strong financial leadership, not just within the nominee's organisation, but also across the health community. In addition, the judges sought evidence of effective coaching and development of finance teams.

The judges commented: ‘Steve Webster was the clear winner and we were very impressed by his role in turning North Bristol NHS Trust into the most improved in the South West Strategic Health Authority area. Steve took a collaborative risk-sharing approach to identifying solutions to the financial challenges, and used his broader NHS knowledge to ensure that non-financial aspects were recognised.

‘Steve's technical expertise delivered an excellent PFI solution that will give the people of Bristol access to a new hospital by 2014. He continues to work with energy, enthusiasm and integrity and is a role model for his finance team and finance staff across the NHS,’ they concluded.

Mr Webster pointed out that understanding the service implications of financial decisions was always important.

‘I have always been a finance director that tries to get really close to the clinicians,’ he said. ‘That's where I get real satisfaction – you get it achieving financial targets and the like, but the real satisfaction is supporting people to do the best they can within the resources we have.’ ■



ALSO NOMINATED



Nora Ann Heery

The University Hospital of South Manchester NHS Foundation Trust director of finance and deputy chief executive was nominated for her pivotal role in setting the finance and service direction of the trust. She was praised for spending time with frontline staff regularly in order to understand how financial decisions impact on services. Ms Heery has also been involved with the local health economy's *Securing our shared future* strategy, which aims to save £200m over the next four years.

Keith Griffiths

The senior finance team at Wrightington, Wigan and Leigh NHS Foundation Trust were keen to nominate their director of finance and informatics for his role in delivering a £14.5m cost improvement programme in 2009/10 (£13.6m in 2010/11) in ‘an open, inclusive and most importantly safe, risk-aware manner’. His financial strategy has exceeded plans, delivering a financial risk rating of 4 in the first year of operation as a foundation trust. His honest approach means staff at all levels understand the issues facing the trust.



Jeremy Cook

The Barnet, Enfield and Haringey Mental Health NHS Trust director of finance was nominated by chief executive Maria Kane for his ‘exceptional leadership’ during a difficult time for the trust. When he joined in August 2009, the trust had an operating deficit of £2.4m with unidentified CIPs of £3.5m. He got the best out of a senior finance team that was virtually new to the trust, which ended 2009/10 with CIP savings of £11.9m (6.9% of turnover). This was £2.5m above plan.

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FIRST FOR DEDICATION

ELAINE KONIECZNY BECAME the first HFMA Deputy Director of Finance of the Year at the 2010 awards ceremony in London. As Sherwood Forest Hospitals NHS Foundation Trust's deputy director of finance and procurement, she won the award for her drive and dedication to the job and the wider NHS finance function.

Ms Konieczny said the award was a tribute to the mentoring of her executive director of finance, Lee Bond, and the support of her finance team. She joined the NHS from school in 1978, initially as a creditor payment officer, and progressed through the ranks to deputy finance director in 2004.

She said working her way up from an entry-level job has shaped her approach to leadership. 'I have done almost every job in finance that could be done and perhaps because I have "been there and done it", I appreciate the hard work of everyone from the most junior to the top of the team.

'I believe strongly that you should be the best you can be and, once you've got there, try to get a little bit better. Things never stay still.'

Mr Bond said Ms Konieczny's belief in constant improvement sets her apart from her peers. Over recent years, she has led her department through successful implementation of international financial reporting standards (IFRS); the introduction of monthly service line reporting; the development and implementation of ever tighter cost improvement programmes; and the integration of the procurement function into the finance directorate.

The IFRS implementation was particularly challenging because the trust holds several high-value private finance initiative contracts, with primary care partners as co-signatories.

Mr Bond added that Ms Konieczny had met each member of the procurement team to understand the challenge prior to integration



Paul Assinder and Suzanne Tracey – HFMA presidents old and new – present Sherwood Forest's Elaine Konieczny with her award

■ **Winner** Elaine Konieczny, Sherwood Forest Hospitals NHS Trust

■ **Also shortlisted** Andy Ray, Basildon and Thurrock University Hospitals NHS FT; Simon Covill, Whipps Cross University Hospital NHS Trust

with the finance department. This approach had paid off, resulting in an improvement in procurement performance and the virtual elimination of staff sickness.

Her leadership and quest for constant improvement has helped the department win a number of internal and external awards over the past few years. This culminated in CIMA's public sector finance department of the year award in 2009.

Ms Konieczny has been instrumental in instigating and organising a finance cohort made up of senior finance staff from foundation and non-foundation trusts.

As well as enhancing individuals' development, the cohort shares finance skills, learning and best practice. Members have shared benchmarking information and cost improvement programmes, and are due to look at finance reporting techniques and Lean management.

She said the cohort developed from the trust's involvement in a Monitor/McKinsey pilot on service line management.

Once this had run its course, she decided the contacts she had made with other trusts should not be lost. Membership stretches across the country, from Hull and Stockport in the north to Devon in the south.

'I think the NHS works in silos far too often, so it doesn't get the benefit of joined-up thinking,' Ms Konieczny said. ■

WHAT THE JUDGES SAID

"Elaine has shown exceptional leadership skills, she is self-driven and motivated and has consistently delivered on all the challenges in her trust. Her role has encompassed work that has not only had an impact on her own organisation but also benefited the wider community"



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PREPARED TO WIN

NHS BOURNEMOUTH AND Poole has developed a reputation over the past few years for aiming to get its accounts in early. It has also set out to prove that the long hours and weekend working so often associated with the preparation of accounts can be avoided. For achieving these targets and producing flawless accounts, the primary care trust won this year's HFMA Accounts Team of the Year Award.

The PCT submitted its 2009/10 accounts to the Department of Health five days before the national deadline, becoming the first organisation to do so for the second year running. The previous year's accounts were submitted three days before deadline. At the same time, the 2009/10 accounts were made available for external audit, along with full electronic and hard copy working papers.

The achievement is made more remarkable by the introduction of earlier closure of accounts and the implementation of international financial reporting standards (IFRS). And, not content with its stellar performance the year before, the accounts team sought further improvements – reducing working hours to produce the accounts while improving their quality.

All this had to be done without a full team in place. The head of management accounting covered the deputy director of finance role in

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- **Winner** NHS Bournemouth and Poole
- **Also shortlisted** 5 Boroughs Partnership
NHS Foundation Trust; Abertawe Bro Morgannwg University Health Board

the final quarter but no replacement was made for their post.

The team said it met these challenges by spreading the work out throughout the year and following a detailed plan to achieve faster closure. Full working papers were completed on a rolling basis and a full set produced at month 11.

This reduced the pressure during the closedown period, as the working papers simply required updating with month 12 data.

A standard format for working papers and an accompanying checklist produced a robust audit trail, while the financial elements in the protected working papers updated summarisation schedules. This in turn updated the accounts, the annual report and board briefing papers, reducing both the time needed in the final stages and the risk of inconsistency.

When workload peaks, such as during the accounts process, the finance department draws no distinction between financial and

management accountants, so all engage in the process of accounts production.

And, with revenue and capital plans for 2010/11 approved by the board, uploaded to the general ledger and issued to budget holders in March, the finance team could focus exclusively on executing the accounts closedown plan.

The judging panel commended all three shortlisted bodies, which overcame challenges such as the introduction of IFRS-compliant accounts, structural changes or becoming a foundation trust part way through the year. But NHS Bournemouth and Poole stood out.

The judges were impressed that the PCT's finance director came to the panel hearing on the submission, but only in a supporting role – recognising that the team that had done the hard work delivering the accounts should address the panel.

Pete Papworth, the PCT's assistant director of financial management, said the team was delighted to win the award. 'One of the key things is where we have come from. We have been able to shave 12 days off the closing period over the past two years. That's quite a significant achievement.'

The decision to complete working papers each month was a crucial step, he added. 'It meant that at month 12 we didn't have to work ridiculously long hours.' ■

WHAT THE JUDGES SAID

"As well as being the first to submit their accounts to the Department of Health with no interventions as a result of the audit, they completed their accounts quickly and to a high quality and the team are rightly proud of their achievement"



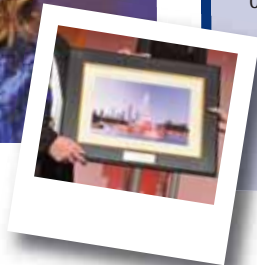
The winning team receives its award from the Department of Health's Janet Perry (centre right)



The awards ceremony was held during the HFMA annual conference in London, which was addressed by health minister Simon Burns (below left), chief executive Sir David Nicholson (left) and David Flory (far right with incoming HFMA president Suzanne Tracey).

- Main picture (above): all the awards winners, including Finance Director of the Year Steve Webster (centre left)
- Also on this page (right, top to bottom): David Walsh of Havelock Award winner NHS Central Lancashire; Deputy Finance Director of the Year Elaine Konieczny; and members of the Accounts Team of the Year from NHS Bournemouth and Poole
- Far right: HFMA US chair Debi Kuchka-Craig presented the UK association with a painting of Buckingham Fountain in Chicago, home to HFMA US





GOOD FELLOWS

As well as the industry awards, such as Finance Director of the Year, the HFMA also announced personal awards during the annual conference. These admitted three individuals into honorary fellowship of the association.

Honorary awards are given to individuals who have made a substantial and sustained contribution to the life and work of the Healthcare Financial Management Association. Traditionally, honorary fellowships are made to those who have retired from full-time work, those nearing the end of their career or those who have left mainstream finance.



Alan Harper has recently retired from the NHS and currently works on a number of projects including being the finance director for the Institute of Healthcare Management. His 40-year career has seen him work in a number of sectors, with his last role as deputy director of finance for National Services Scotland. An active HFMA member for many years, he was nominated by the Scottish Branch having served as branch chairman from 2005 until 2007. He served on the national board from 2005 to 2009, strongly representing Scotland's interests. He continues to be a long-term supporter of the HFMA.



The second fellowship was awarded to **Cathy Lyons**, whose NHS career spanned five decades. Joining the service after graduating in the late 1970s, her career progressed rapidly culminating in her appointment as director of finance at Liverpool Broadgreen Hospital. Following a merger with the Royal Liverpool Hospital to create the largest acute hospital in Merseyside, she became its director of finance, a role from which she retired in 2010. A keen advocate of the work of the HFMA, especially at branch level, she was nominated by the North West Branch. She has a passion for staff training and was involved in the regional and national finance training scheme. She was also a senior examiner for CIPFA for more than 20 years.



Former NHS director of finance **Colin Reeves** was given the third fellowship. Announcing the award, HFMA chief executive Mark Knight described Mr Reeves as 'one of the association's greatest supporters in the 1990s and early 21st century'. He added Mr Reeves' dealings with the association were both cordial and very supportive, particularly during occasional disagreements with the Department of Health. The HFMA Board and the London Branch nominated Mr Reeves, who has been successful in a variety of organisations. His commitment to staff development has been substantial. During his period as national director of finance, he spearheaded *Framework for the future* – an entire staff development strategy that set the framework for today's finance function.



CONGRATULATIONS

to the winner of the HFMA Governance Award 2010

ACCA's long standing commitment to promoting good governance in the NHS continues with our sponsorship of the Governance Award. This award celebrates an individual, team or organisation that has improved its assurance and risk management arrangements to ensure the effective management of the organisation and the achievement of its priorities.

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IN THE SPOTLIGHT



Clare Brown (centre right) and Jayne Glynn (right) accept their award from ACCA's Julia Rudrum

AUDIT SOUTH WEST and Plymouth Hospitals NHS Trust won the 2010 HFMA Governance Award for its joint project to integrate the management of clinical and internal audit into a single function at the trust.

Reviews of clinical audits carried out by Audit South West have identified that while they are often well planned and delivered at a directorate level, there is scope to increase their corporate impact. This could be through considering the link with corporate objectives, high-level risks and the board assurance framework; using clinical performance indicators to inform planning at board level; and through more focused monitoring and delivery of clinical audit plans to ensure priorities are met.

The scope for greater corporate impact led to the integration of internal and clinical audit into a single audit service. As far as they are aware, it is the only audit provider to do so.

The integration of the services has changed the way aspects of clinical assurance – which are related to clinical audit – are reported to the trust's audit committee.

Non-executive directors who sit on the committee are now more aware of the clinical audit team's work and the committee gets an overview of clinical audit plans, performance and assurance.

Jayne Glynn, the trust's healthcare governance manager, said winning the award was a 'huge achievement'. The initiative had changed the way the clinical audit process was managed completely and made it much more effective.

Clare Brown, deputy director of audit services for Audit South West (the NHS internal audit and consultancy providers to

auditors have built up an understanding of the level of detail required.

The planning process for clinical audit has improved. Rather than the traditional directorate-led approach, there is a top-down, trust-wide arrangement led by the medical director. Although the initiative is still in its first year, the trust has received a positive response from clinicians. There has been a greater involvement in clinical governance and a better understanding of the issues faced by the trust.

In addition, the rigour and standards that the internal audit team applies to its work are now being applied to clinical audit. Reports have moved away from counting the volume of audit activity to focus on the results or issues highlighted by the work of the team.

Integration of the services has also led to economies of scale through a single management team, one audit plan and a single report to the audit committee on all aspects of assurance.

The judges were impressed by the innovation and improvement demonstrated by the shortlisted entrants, but chose the Plymouth/Audit South West submission because of the originality of the scheme and the successful integration of internal and clinical audit – a feat few have managed.

'There was a clear improvement in governance arrangements as a result of combining internal and clinical audit processes. Decisions on where audit work can be directed can be made for the organisation as a whole, as well as locally, leading to improved services and ultimately better outcomes for patients,' they said. 'The clear links to Care Quality Commission outcomes and the assurance framework allows efficiency and clarity.'

Judges added that the approach could be adopted as best practice across many organisations. ■

Sponsored by ACCA

■ **Winner** Plymouth Hospitals NHS Trust / Audit South West

■ **Also shortlisted** Audit South West / Urgent Health UK Ltd; NHS National Services Scotland; York Teaching Hospital NHS FT

Plymouth Hospitals Trust), said audit activity was being reported to the audit committee for the first time. 'The key thing was to plan the audit activity corporately. The clinical audit team, which was two members of staff, has been subsumed into a larger audit team giving them greater support.'

Both paid tribute to trust medical director Alex Major and the wider audit team.

The work has also enhanced the internal audit team's understanding of the organisation and has led to greater involvement in aspects of clinical governance arrangements at the trust. Clinical audit reports are more tailored to the needs of non-executives, as the internal

WHAT THE JUDGES SAID

"There was a clear improvement in governance as a result of combining internal and clinical audit processes. Decisions on where audit work can be directed can be made for the organisation as a whole, as well as locally, leading to improved services and ultimately better outcomes for patients"

IT'S ALL IN THE TIMING

IT'S OFTEN SAID that timing is everything, and Basildon and Thurrock University Hospitals NHS Foundation Trust's performance management reports are a perfect example. The HFMA Efficiency Award winner found that producing weekly financial and other performance measures has helped reduce costs and improve the quality of care.

Following Care Quality Commission intervention on concerns over hygiene and care in 2009, expenditure grew dramatically as the trust addressed the issues. However, the financial imbalance remained and was exacerbated in 2010/11 by tariff changes.

It became apparent that clinical managers struggled to manage their services using data produced monthly. Following an example set in a totally different sector – the Savoy Hotel Group – the trust decided that each Monday managers would receive feedback on the performance of their service in the past week.

The finance department was closely involved from the start. There was scepticism at first among clinical managers that the information could be produced so quickly, but strong support from the board and hard work from finance staff to engage clinical teams drove the changes through.

Changes had to be made to deliver the weekly information. For example, ward managers had to submit staffing information by 11am each Monday, while the finance team developed a costing model that applies standard prices to each discharge. (This has proved to be in line with fully coded income levels to 0.7% tolerance.)

Managers can now relate activity by day of the week to income, staffing, sickness and annual leave management almost in real time. Each directorate holds multidisciplinary service management meetings each Monday, in which finance and other managers can discuss the previous week's metrics and act accordingly. These meetings now look ahead to what will



Tribal's Stephen Vinnall (third from right) presents the Efficiency Award to Basildon and Thurrock team members

Sponsored by Tribal

- **Winner** Basildon and Thurrock University Hospitals NHS Foundation Trust
- **Also shortlisted** University Hospitals of Morecambe Bay NHS Trust; Wrightington, Wigan and Leigh NHS Foundation Trust

happen in the coming week, allowing them to quickly take corrective action if necessary.

Since the metrics were introduced in April 2010, temporary nursing costs have reduced by £100,000-£150,000 a week, while the bank now fills more than 90% of temporary nursing shifts (up from 76%), improving quality and reducing cost. Managers receive near real-time

information on the effect of extraordinary events, such as clinical audit days or systems failures – a power cut in theatres cost £500,000 in one week, for example. It allows them to address issues quickly.

A set of monthly key performance indicators have been developed for review by the board, while similar packs are being developed for ward managers.

Andy Ray, the trust's acting director of finance, said the whole finance team had contributed to winning the award. Matt Ebdon, assistant director of financial management, added: 'This is a real testament to the hard work of the whole team. It has been a tough year at Basildon and Thurrock, with all sorts of interventions, but we have put that behind us and turned the trust around.'

The judging panel was impressed by the implementation of weekly, and in some cases daily reporting of the financial and clinical performance indicators, without the development of expensive additional IT systems, and without additional resource.

Judges were also impressed with the other shortlisted entries, particularly Wrightington, Wigan and Leigh's treasury management and sharing of best practice, and the scale of the savings and achievement of targets at Morecambe Bay. ■

WHAT THE JUDGES SAID

"The finance team has secured the support and commitment of clinical operations to prioritise the production of information that assists in the effective management of the organisation. The savings are significant; yet they have improved clinical quality"



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T R I B A L



NHS Central Lancashire is presented with the award by judge Letsie Tilley (centre) and CIMA's Paul Gillot (far right)

CENTRAL EXCELLENCE

WITH THE DOWNWARD pressure on management costs and the impending changes in the financial and structural landscape, it would be understandable if primary care trusts decided to curb their training budgets.

Not so for NHS Central Lancashire. Having decided that training is an investment in the health service's future, the PCT is supporting an innovative finance training and development programme that has earned it the HFMA Havelock Training Award.

The award recognises significant contributions to finance skills development among finance staff, and in raising the financial awareness and knowledge of non-finance staff.

The Central Lancashire team met the criteria on both counts. When the PCT was formed in 2006, only two finance staff members were studying for a qualification out of a cohort of 40; the department had no accreditation and no finance training strategy. At its peak, 12 members of staff were studying (two have now completed their courses) and the team has achieved the NHS Towards excellence accreditation. Within the finance team each staff

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- **Winner** NHS Central Lancashire
- **Also nominated** Newham University NHS Trust; Yorkshire and the Humber finance skills development team

member gets at least five days a year for development and skills training as part of its staff development programme.

The programme is linked to post-holders' personal development plans, knowledge and skills framework requirements and the 11 world class commissioning competencies. The PCT says its scores on the use of resources assessment and the finance-related WCC competencies have improved as a result.

The programme includes technical skills, such as forecasting techniques, and 'soft' skills, including time management, influencing and negotiation. Staff are rotated across training and development posts, while senior staff below head of department level take it in turns

WHAT THE JUDGES SAID

"By adopting a multidisciplinary approach to training and development they have made a significant contribution to the strong improvement in the PCT's world class commissioning competencies"

to chair the team's finance operations group – the group was set up to resolve departmental risks and issues. Finance staff have been involved in multidisciplinary teams on financial forecasts, WCC and financial planning.

Looking outside finance, the team has delivered a series of events for non-finance staff. This included a 'speed dating' lunchtime event that allowed the 122 staff who attended to ask questions about finance in an informal setting – 91% of the attendees agreed or strongly agreed that the event was effective, helpful and worthwhile.

The judges said Central Lancashire stood out from a strong field of candidates. As well as raising its profile over the past few years, it had demonstrated a range of good practice linked to positive outcomes.

They added: 'As well as achieving a significant increase in the total number of staff undertaking formal training, they have also provided bespoke opportunities for all their finance staff. By adopting a multidisciplinary approach to training and development they have made a significant contribution to the strong improvement in the PCT's world class commissioning competencies.'

'They have also employed innovative ideas such as 'finance speed dating' to improve financial skills of non-finance staff, while their accounts payable team has received local recognition through the PCT chair's special award.'

'This is just unbelievable,' said deputy director of finance David Walsh. 'It's a recognition of the dedication and sheer determination of the whole team to deliver significant improvements. It gave them a chance to develop new skills.'

Speed dating was a way of making the finance team more visible and making wider staff groups aware of what they do, he added. ■

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CIMA, the Chartered Institute of Management Accountants, has 172,000 members and students working in a variety of business sectors, including over 8,000 in the UK public sector alone. CIMA numbers continue to grow as organisations recognise the need for a more commercial approach blended with public sector accountabilities.

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Former HFMA chairman Chris Calkin joins Paul Assinder in presenting Philip Thomas his award

MEDICAL MASTER

This year's Working with finance – Clinician of the Year Award went to Philip Thomas, consultant urologist and clinical chief of finance at Brighton and Sussex University Hospitals NHS Trust. Mr Thomas has been a stalwart adviser to the trust's management since it was put into turnaround in 2006.

As clinical adviser to the turnaround team, Mr Thomas provided specific support for patient flow and medical workforce productivity workstreams. And since 2008 he has been the trust's clinical chief of finance – providing leadership and a clinical perspective on the delivery of the trust's efficiency plan; chairing the business case and investment group; leading the service line reporting programme; and acting as clinical director for the finance and business support division.

He has led the design and implementation of the trust's current two-year plan to deliver 10% cost improvements (£40m) through significant service transformation. And he has been central to the development of a robust system monitoring readmission rates in diabetes, chronic obstructive pulmonary disease and alcohol and substance misuse. This has led to a health economy-wide plan to reduce readmissions that will release savings to the primary care trust and improve patient care.

Supported by the Academy of Medical Royal Colleges

■ **Winner** Philip Thomas, Brighton and Sussex University Hospitals NHS Trust

■ **Also shortlisted** Fiona Jackson, Barnet Community Services; Roger Tillman, The Royal Orthopaedic Hospital NHS FT; Mahmood Adil, Wrightington, Wigan and Leigh NHS FT

As chair of the business case and investment group, a board sub-committee that reviews capital and service development proposals, he is central to decisions that link day-to-day business and long-term financial planning. He retains a focus on patient safety so investment

decisions are not based solely on finances.

He maintains his clinical work – fitting in six programmed activities a week, giving him credibility and authority with his clinical colleagues. He has also championed clinical engagement by leading the design of pathways for urology and musculoskeletal outpatient services and leading the trust's service line reporting development and roll out.

The judges said Mr Thomas demonstrated clinical engagement at the 'highest level' and the results of this engagement could be seen in the tangible benefits to patients and costs of a programme to rationalise care on two sites. This allowed optimum use of facilities and minimal disruption to elective surgery and more effective use of the medical workforce out of hours.

'The panel were impressed by both the breadth and depth of the clinical engagement and the integrated partnership working, which is an excellent example of delivering benefits to patients and costs by working together,' they added.

The trust's chief financial officer Chris Adcock said Mr Thomas' 'extensive and wide-ranging' contribution to the trust's financial recovery and his leadership in developing the finance and business support division's operations has been recognised by the creation of the clinical chief of finance post. This is a post on both the divisional management team and the trust's management board.

'His contribution is fundamental to ensuring that business management and planning is clinically and operationally informed and also provides constructive challenge to the financial and commercial perspectives of a team predominantly made up of accountants,' Mr Adcock added.

Mr Thomas dedicated the award to the clinical and financial staff at the trust. 'I am very grateful to the HFMA for this award and my contribution has only been made possible through the endeavour of others. This is the way forward – clinicians and finance staff working together,' he said.

'As clinicians we have a lot of influence in the organisation and finance to the same extent. We have more power in influencing the efficient use of resources together, than I can exert through my clinical practice alone.' ■

WHAT THE JUDGES SAID

"Philip has been at the heart of the reform agenda at Brighton and Sussex University Hospital NHS Trust. This is clinical engagement at the highest level, integrating and embedding clinical input into the finance process"

WINNERS THROUGH THE YEARS

HFMA Awards have been celebrating high achievers over the years – here's a reminder of some past winners



Finance Director of the Year 2009, Paul Hinnigan

Accounts Team of the Year

- 2009 Mersey Care NHS Trust
- 2008 Hull and East Yorkshire NHS Trust
- 2007 North West Ambulance Service NHS Trust
- 2006 Wrightington, Wigan and Leigh NHS Trust
- 2005 Foyle Health and Social Services Trust
- 2004 Isle of Wight Healthcare NHS Trust

Charitable Funds Management Award

- 2009 Above and Beyond Charities
- 2007 Birmingham Hospital Children's Charities

Clinical Engagement Award

- 2009 Dr Ellen Wilkinson, Cornwall Partnership NHS Trust (Clinician of the Year)
- 2008 South Manchester Practice-Based Commissioning Group and NHS Manchester (joint submission)
- 2007 Christie Hospital NHS Foundation Trust

Finance Director of the Year

- 2009 Paul Hinnigan, NHS Blackburn with Darwen
- 2008 Sue Jacques, County Durham and Darlington NHS Foundation Trust
- 2007 Jane Tomkinson, Countess of Chester NHS Foundation Trust

Efficiency Award

- 2009 Newham University Hospital NHS Trust
- 2008 2gether NHS Foundation Trust



Outstanding Contribution Award for John Flint, 2009



2006 Honorary Fellow Christine Dawes



Havelock Training Award for Sherwood Forest, 2007



2008's award winners lineup, including Finance Director of the Year Award winner Sue Jacques (back centre)

Financial Management Award

- 2009 Bromley Primary Care Trust
- 2008 North East Lincolnshire Primary Care Trust
- 2007 Devon Partnership NHS Trust
- 2006 Bro Morgannwg NHS Trust
- 2005 Liverpool Women's NHS FT

Governance Award

- 2009 Ipswich Hospital NHS Trust
- 2008 Plymouth Hospitals NHS Trust
- 2007 Redbridge Primary Care Trust
- 2006 Oldham Primary Care Trust

Havelock Training Award

- 2009 Heart of England NHS Foundation Trust
- 2008 NHS London
- 2007 Sherwood Forest Hospitals NHS Trust

Honorary Fellowship

- 2009 Peter Shanahan; Chris Macklin; Joe Teape; Andrew Goodwin; Spencer Prosser
- 2008 Linsay Stead; Paul Dillon-Robinson; Alan Foster; John Goulston; Dick Clarke; Louise Shepherd
- 2007 John Grimes; Roger Tester; Richard Douglas; Cathy McKillop; Roger Chapman
- 2006 Christine Dawes; Mike Brereton
- 2005 John Gibbons; Graham Nix; Tom Taylor; Phillip Gutcher
- 2004 Hilary Ayerst; Paul Miller; Roger Swain; Susan Goldsmith; Steve Wallwork
- 2003 Mike Stepney; John Anderson; Richard Upton; Norman Carson; Helen Chalmers
- 2002 David Bowen; Peter McLaughlin
- 2001 Nigel Towns
- 2000 Ray Spurgeon
- 1999 Martin Davis; Paul Hiscock; Bill Healing

Outstanding Contribution Award

- 2009 John Flint
- 2008 David Bowen
- 2007 Ray Thomas; Emma Knowles
- 2006 Paul Taylor
- 2005 Steve Elliot; Alastair MacArthur
- 2004 Kim McNaught
- 2003 Paul Dillon Robinson
- 2002 Keith Wood

Requirement to improve financial management amongst non-finance managers?



It is now more vital than ever for NHS staff to have a good understanding of financial issues and the impact these have on efficiency within their organisation. HFMA's e-learning, a cost effective, unique and flexible way of training, could be part of the solution to increase financial awareness. 43,000* assignments have already been deployed resulting in more than 70% of organisations realising the benefits of HFMA e-learning.

“HFMA e-learning - should actually be mandatory for all new NHS staff”

Phill James, Assistant
Director ICT Modernisation,
North West Ambulance Service

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Audience:

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*As at October, 2010.

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Finance training for finance and non finance staff