



Professional development for finance staff at integrated care boards (ICBs)

A guide that brings together professional development resources relevant to ICB finance staff



Introduction

The HFMA has produced a professional development guide for finance staff at integrated care boards (ICBs). The guide brings together key training, tools and publications to support finance staff in adapting to their new roles at ICBs.

ICBs were established in July 2022 and as such all ICB finance staff are relatively new to their roles. Though many have worked at clinical commissioning groups (CCGs), we recognise that the roles and skills needed by ICB finance teams are different to those of CCG finance teams.

HFMA's ICB Finance Group was set up to support and represent the interests of finance professionals working in ICBs and provides opportunities to work on solutions for common issues.

The ICB Finance Group has created a guide with links to key training, tools and publications to support ICB finance staff. The guide is not intended to be exhaustive but signposts key resources which are available as at June 2023.

Our aim is to make it easier for ICB finance staff to find and access resources to help develop their skills and support them with the challenges they face. The resources are split into categories to help make navigation easier. Links to each section can be found in the contents list on the next page.

It should be noted that there may be a charge to access some of the development opportunities referred to and that accessing some of the publications may require HFMA membership.

HFMA members receive exclusive resources, technical guidance and insightful thought leadership that aims to support their personal growth and career development. With seven decades of experience, the HFMA is proud to equip over 20,000 members with high-quality continuing professional development and educational opportunities. [Find out more information about becoming an HFMA member.](#)

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Key

Publications

The HFMA produces regular publications to support its members and the wider healthcare finance community. These include summaries of new guidance, technical support and responses to consultation papers. HFMA publications are CPD accredited.

HFMA bitesize courses

HFMA bitesize provides a range of online CPD accredited courses, covering essential healthcare business and finance subjects. Short courses offer 3 hours introductory level CPD. Intermediate and advanced courses provide 6 and 10 hours CPD respectively, to deepen your understanding of a subject.

Webinars

The HFMA regularly runs free online CPD accredited events for finance and non-finance staff across NHS. Our aim is to provide the opportunity to listen and interact with NHS thought leaders, sharing their insights, ideas and the most up-to-date technical knowledge.

Guides

The HFMA's introductory guides provides easy to read but comprehensive guidance on various healthcare finance topics, whilst our practical guides are designed to be a key reference sources to support healthcare finance staff in their roles.

Podcast

The HFMAtalk podcast explores the topics that are of interest to the healthcare finance community, hearing from thought-leaders and shining a light on good practice in NHS finance and governance.

One NHS Finance (ONF)

One NHS Finance is a national programme designed to engage everyone in improving NHS Finance to support the delivery of quality services for patients. The programme consists of resources designed to advance the understanding of finance in the NHS.

Business cases

Resource	Links to tools and guidance	Availability	Last updated
One NHS Finance	Writing a value-focused business case A guide giving practical tips on how to consider value as a key part of your business cases, which will in turn lead to better decisions that maximise the use of resources and lead to improved outcomes.	Free	May 2022
HFMA bitesize course	NHS business cases A three-hour course introducing business cases and how they are used in the NHS. This course also looks at option appraisal and the importance of managing change.	Paid for	September 2021
Webinar	The right way to yes – business case governance A one-hour webinar looking at the 'Right Way to Yes' initiative run by Warrington and Halton Teaching Hospitals NHS Foundation Trust. This initiative supports organisations to make changes while following a robust internal governance process.	Free	June 2021
Webinar	The five things you can do to help your capital project succeed A one-hour webinar with Grant Thornton's healthcare advisory team discussing how the NHS can fund successful capital projects. This webinar looks at how to build a compelling business case and manage risk.	Free	May 2020

Capital

Resource	Links to tools and guidance	Availability	Last updated
HFMA bitesize course	NHS capital expenditure A three-hour course introducing capital expenditure and accounting in the NHS. This course explains the terminology used on assets and capital expenditure and explores how assets are managed and accounted for.	Paid for	March 2022
Publication	Summary of Capital guidance for 2022-2025 A briefing summarising key points from NHS England's capital guidance for 2022-2025 as part of the 2022/23 priorities and operational planning guidance.	Free to HFMA members	April 2022
Publication	Accounting for revenue and capital: implications for the digital age A briefing which helps explain the financial regime when developing innovative digital technologies.	Free	December 2021
Webinar	ICS stories: Capital prioritisation in Nottingham and Nottinghamshire ICS A one-hour webinar on capital prioritisation in the Nottingham and Nottinghamshire integrated care system. This webinar discusses capital and estate risks and priorities, system-led prioritisation in a resource-limited capital envelope and lessons learned.	Free	September 2021

Career development

Resource	Links to tools and guidance	Availability	Last updated
One NHS Finance	Development programmes Development programmes for various grades to help you progress your career in NHS finance.	Free	Ongoing
Other	Mentoring services Mentoring service run by HFMA, free to NHS finance staff working in bands 2 to 6.	Free to bands 2-6	Ongoing

Decision-making

Resource	Links to tools and guidance	Availability	Last updated
One NHS Finance	Best possible value decision framework A reference guide to support individuals, organisations and local health economies in making value-based decisions more effectively.	Free	June 2017
One NHS Finance	Framing decisions for value A guide giving practical tips on how to frame decisions in terms of value. This helps us to avoid damaging relationships, ensures time and resources are not wasted and increased the chances of decisions being made and successfully implemented.	Free	May 2022
HFMA bitesize course	Decision-making A 10-hour course examining the decision-making process. This course looks at how we make decisions, how we can improve our decision-making by using frameworks and models, and how important decisions are made in the NHS.	Paid for	March 2023
HFMA bitesize course	Board-level decision-making A 10-hour course looking at the role of a board of directors in an NHS organisation and accountability for using scarce resources to deliver best value.	Free to NHS staff	March 2023
HFMA bitesize course	Information systems in decision-making A 10-hour course examining how organisations receive, generate, analyse and disseminate large amounts of data to improve the decision-making process. This course explores various data sources and discusses the legal and professional obligations that limit data-sharing.	Free to NHS staff	March 2023
HFMA bitesize course	Investment decision-making in the NHS A 10-hour course exploring how NHS organisations decide on the best use of resources when redesigning services.	Paid for	April 2023
Webinar	Board-level decision-making for value A one-hour webinar looking at how NHS Boards can adapt their decision-making processes to balance competing demands and priorities and achieve best value.	Free	October 2021

Webinar	<u>Ethics and professional considerations</u> A one-hour webinar looking at how our decisions are guided by professional ethics. This webinar considers the role of ethics in guiding the work of professional accountants and explores how to mitigate against failures in professional behaviour.	Free	June 2020
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Environmental sustainability

Resource	Links to tools and guidance	Availability	Last updated
Publication	NHS environmental sustainability guidance map A quick reference guide which brings together key guidance, tools and examples to support the NHS in meeting its commitments to environmental sustainability. This is aimed at those working in the NHS, in particular NHS boards, finance teams and clinical colleagues.	Free	May 2023
Publication	Sustainability reporting in the NHS A briefing which sets out the NHS environmental sustainability commitments and reporting requirements across the UK, what NHS organisations must report on in 2022/23, along with good practice in sustainability reporting for NHS organisations in 2022/23 and beyond.	Free	April 2023
Publication	Roundtable: greening up A roundtable, in association with Lexmark, exploring how efforts towards greater environmental sustainability will affect NHS finance, and how finance managers can support the sustainability agenda.	Free	November 2021
Publication	Driving environmental sustainability: ten top tips for finance teams A short paper which supports finance teams to have conversations across organisations, and health and care systems, on what actions they can take.	Free	November 2021
Publication	Environmental sustainability round-up A summary of the latest developments in the NHS and wider finance profession as the movement for improved environmental responsibility continues.	Free	May 2023
Webinar	NHS environmental sustainability – tackling the health climate emergency A session on the launch of NHS England's <i>For a greener NHS</i> campaign. Speakers share ideas on how to reduce the impact on public health and the environment while also saving money.	Free	July 2020
Webinar	Towards net zero series: developing the greenest hospital in Britain A case study and lessons learned from the project team at Velindre University NHS Trust which is planning for its new cancer centre to be the 'greenest hospital in Britain'.	Free	January 2023
Webinar	Towards net zero series: embedding sustainability at The Royal Wolverhampton NHS Trust	Free	September 2022

	A case study and lessons learned from Janet Smith, head of sustainability at The Royal Wolverhampton NHS Trust. This includes work to manage and reduce carbon emissions, mitigate air pollution and improve recycling performance.		
Webinar	Achieving net zero carbon: Savings & innovation through sustainable procurement A session from the NHS England and NHS Improvement Sustainable Procurement Team on work to reach net zero through sustainable procurement, associated cost and carbon savings, and innovative approaches that NHS staff can make to embed sustainable procurement.	Free	November 2021
Webinar	Sustainability and savings through the green plan: lessons from Cornwall A case study and lessons learned from the Royal Cornwall Hospital NHS Trust's work on its green plans. This webinar looks at practical ways to deliver sustainability and create savings.	Free	October 2021
Podcast	Integrated care systems and improving environmental sustainability A discussion on how integrated care systems can drive sustainability and the role of the finance function needs to play. Featuring Alexis Percival, environmental and sustainability manager at Yorkshire Ambulance Service, and Dr Aarti Bansal, GP and founder of the Greener Practice Network.	Free	March 2022

Financial sustainability

Resource	Links to tools and guidance	Availability	Last updated
Publication	Financial sustainability – the essential building blocks A briefing exploring the challenge of financial sustainability. It sets out the essential building blocks required to develop a systematic long-term approach to delivering value, which in turn will support the delivery of high-quality sustainable patient care.	Free	June 2022
Publication	Financial sustainability – engagement pack A slide deck and accompanying speaker notes to help finance staff engage with operational teams, clinicians and budget holders. The slide deck explains the importance of financial sustainability and everyone's role in achieving it.	Free	June 2022
Publication	Improving NHS financial sustainability: are you getting the basics right? A self-assessment tool to help finance teams think about the core elements that should be in place to support board assurance over an NHS organisation's financial sustainability.	Free	April 2022
Publication	How to review and scrutinise the numbers during the year A briefing which sets out a series of questions that non-executive directors can ask at board and sub-committee meeting in order to assess financial sustainability and identify any areas of potential concern.	Free	April 2022
Publication	How it works - understanding the financial position A briefing to help NHS organisations understand their financial position, going beyond control totals to look at the financial statements as a whole. It looks at the importance of movements in current assets and liability balances and what they might mean.	Free	March 2018
Publication	NHS financial temperature check A briefing which summarises results from the HFMA's 2022 finance director survey. This briefing explores financial pressures and the strategies the NHS is taking to address them.	Free	December 2022

Health inequalities

Resource	Links to tools and guidance	Availability	Last updated
Publication	Health inequalities: establishing the case for change An introductory briefing on health inequalities, produced with NHS England. This briefing explains why health inequalities are important and how finance staff can support the case for change (both within their organisation and across the local system).	Free	May 2023
Publication	The role of the NHS finance function in addressing health inequalities A short paper which explores what is meant by health inequalities, what causes them and the impact they can have on people's health and the NHS. It also considers the role that NHS finance staff can play in tackling inequalities.	Free	July 2021
Podcast	The finance role in addressing health inequalities A discussion on health inequalities and the key role finance professionals can play to address them. Featuring Dr Bola Owolabi (Director of health inequalities at NHS England and NHS Improvement), Hannah Witty (CFO at Central and North West London NHS Foundation Trust), and Duncan Orme (acting CFO at Nottingham University Hospitals NHS Trust).	Free	January 2022
Publication	Health inequalities data sources map A reference guide to enable NHS finance staff to support their organisations to tackle health inequalities. It brings together key guidance documents, national statistics and data from across the four nations of the United Kingdom.	Free	November 2022
Publication	Using cost data to address health inequalities A briefing to support costing practitioners understand how they can play a role in tackling health inequalities. The final section includes examples of work undertaken by costing practitioners in NHS trusts to support local initiatives on health inequalities.	Free to members of the Healthcare Costing for Value Institute	April 2022
Publication	Investing to reduce tobacco usage and tackle associated health inequalities A briefing which explores smoking cessation policy, funding streams and case studies. It discusses the role of the finance function with advice which is transferable to other areas of reducing health inequalities and improving population health.	Free	January 2023

Influencing and negotiating

Resource	Links to tools and guidance	Availability	Last updated
HFMA bitesize course	Influencing and negotiating A six-hour course exploring the skills and techniques used to influence others and techniques to improve the way we negotiate. This course also looks at motivation, relationship management and conflict management.	Free to NHS staff	February 2023
HFMA bitesize course	Change management A six-hour course looking at the definition of change and the process of change management. This course also explores three change models that can help to deliver successful change.	Free to NHS staff	February 2023
HFMA bitesize course	Effective communication and presentation A six-hour course exploring the concepts of communication, NHS policies, the vision of the organisation, how decisions are made and how information is provided to patients. This course also looks at how to write effective reports and how to plan presentations and present your ideas with confidence.	Free to NHS staff	February 2023
HFMA bitesize course	Managing conflict A six-hour course looking at tools and techniques used to manage relationships and improve the engagement and motivation of individuals and teams. This course also explores the nature of conflict, as well as techniques to help you negotiate and manage conflict.	Free to NHS staff	February 2023
HFMA bitesize course	Motivation and relationship management A six-hour course looking at ways to manage relationships with stakeholders to help achieve an organisation's business aims and objectives. This course is designed to help you understand more about yourself as a manager, understand others and be more effective in the way you lead.	Free to NHS staff	February 2023
Webinar	Influencing and negotiating A one-hour webinar exploring tools and techniques to make yourself heard. This webinar also covers key techniques for influencing including active listening and appreciative inquiry, and gives tips on how to achieve a successful and effective outcome that is acceptable for all.	Free	July 2020

Webinar	Managing change A one-hour webinar exploring the nature of change and sharing some useful tools and techniques to help deliver successful change. This webinar looks at a number of change models and explores ways of overcoming resistance to change.	Free	January 2021
Webinar	Effective communication and presentation A one-hour webinar introducing the tools of sharing information well, looking at how these can be applied to remote communication and what this might mean when we return to the physical work environment.	Free	May 2020
Webinar	Managing conflict A one-hour webinar exploring the nature of conflict, looking at different types of conflict and discussing some of the drivers and situations that may give rise to conflict. This webinar also gives some useful models for helping to manage and resolve conflict.	Free	October 2020
Webinar	Motivation and relationship management A one-hour webinar which looks at the differences between motivating for the short and the long term, and considers the additional factors when motivating in difficult times.	Free	October 2020

Information and data (including costing)

Resource	Links to tools and guidance	Availability	Last updated
Publication	Information governance for costing at a system level A briefing which explores data sharing across integrated care systems, focusing on patient-level costing information. The briefing covers key guidance, challenges and examples of integrated care systems which are successfully linking datasets.	Free	January 2022
Publication	What finance data is required to drive value at a population level? A briefing which supports system leaders as they look to improve the health of their local populations in a financially sustainable way. This briefing looks at what we mean by value, explores the finance data required and shares how systems are developing their data flows.	Free	June 2019
Publication	Costing and data quality: improving the quality of non-financial data required for costing A briefing which explores how NHS boards and system leaders can improve data quality to support value-based decision-making.	Free	February 2021
Publication	An introductory guide to costing An introductory guide which explains why costing is important and how it can be used, the fundamental elements of costing in the NHS and the tasks costing practitioners typically undertake.	Free to members of the Healthcare Costing for Value Institute	September 2020
Publication	What does good look like for costing in the NHS? A briefing which explores how the NHS can use costing information to deliver efficiencies and improvements in patient care.	Free to members of the Healthcare Costing for Value Institute	September 2021
HFMA bitesize course	Patient-level costing A 10-hour course examining how patient-level costing data is produced, reported and used in the NHS to improve patient care. This course also looks at how costing is changing in light of integration as envisaged in the NHS Long Term Plan.	Free to NHS staff	October 2022

Webinar	How patient-level costing (PLICS) can support quality improvement A case study from Leeds Teaching Hospitals NHS Trust, where costing and clinical teams aimed to understand and use clinical and costing data to improve patient care.	Free to members of the Healthcare Costing for Value Institute	May 2021
Publication	Improving patient-level costing in community services – Gloucestershire Health and Care NHS Foundation Trust A case study from Gloucestershire Health and Care NHS Foundation Trust, where costing and clinical teams improved the information available on the costs and profile of community services.	Free to members of the Healthcare Costing for Value Institute	February 2021
Publication	Transforming the PLICS landscape A case study from Leeds Teaching Hospitals NHS Trust, where the costing team has created bespoke tools that use costing and clinical information to identify improvements.	Free to members of the Healthcare Costing for Value Institute	November 2020
Podcast	How costing can support the efficiency agenda A case study from Barts Health NHS Trust. Gerald Enezie, assistant director of costing, explains how finance and clinical teams have worked together to develop interactive dashboards.	Free	April 2023

Reporting

Resource	Links to tools and guidance	Availability	Last updated
Publication	Board reporting for ICBs: considerations for best practice A briefing which looks at what information will be required to manage financial performance across each system. It also considers how information can be collected on a consistent and timely basis across all organisations.	Free	September 2022
Publication	Financial reporting watching brief 2022/23 and beyond A briefing looking at changes and developments in accounting standards, best practice in financial reporting and government reporting requirements. It covers the current financial year but also looks ahead to identify changes which will affect the NHS in the future.	Free to HFMA members	May 2023

System partners

Resource	Links to tools and guidance	Availability	Last updated
HFMA bitesize course	Local government A six-hour course looking at differences in the way that local government and healthcare are financed and managed and the impact this has on partnership working.	Paid for	January 2023
Webinar	Local government A one-hour webinar looking at how local government is organised and the key differences between local government and the NHS.	Free	September 2020
Publication	An introduction and glossary to NHS and local government finance and governance in England A briefing which outlines the role of relevant NHS and local government bodies. It includes a glossary of terms used frequently in relation to finance and governance in the NHS and local government.	Free	November 2019
Publication	Working with local authorities: VAT implications A briefing which explores areas where VAT could be a financial barrier to working with local authorities. The briefing sets out VAT arrangements for secondments and joint appointments, the local authority partial exemption and contracting arrangements.	Free	April 2023

System working

Resource	Links to tools and guidance	Availability	Last updated
Publication	Developing an effective integrated care board finance team A roundtable discussion looking at how to develop an effective integrated care board finance team. It explores how the role of an integrated care board is different to the role of a clinical commissioning group and considers how senior finance staff can work together across the system.	Free	September 2022
Publication	Supporting system working through finance: principles and behaviours A briefing which explores the key principles of a system financial framework and the behaviours needed to make it work. This briefing includes examples from different integrated care systems.	Free	November 2021
HFMA bitesize course	Integration in healthcare A six-hour course examining the national policy of integration in health and social care, how it has evolved since 2014 and the challenges it was designed to address. The course looks at different ways that organisations are integrating services across the UK as well as some of the barriers to integration.	Free to NHS staff	January 2023
Webinar	ICS stories: the mental health provider collaborative in Northamptonshire ICS A one-hour webinar with Paul Sheldon, chief finance officer, Northamptonshire Healthcare NHS Foundation Trust and Leicestershire Partnership NHS Trust. This webinar explores the approach taken to setting up a mental health, learning disability and autism provider collaborative.	Free	June 2022
Webinar	ICS stories: the importance of relationships in Hampshire and the Isle of Wight A one-hour webinar with Malcolm Ace, chief finance officer, Hampshire Hospitals NHS Foundation Trust. This webinar explores how system working has developed in North and Mid Hampshire, the importance of relationships and lessons learned.	Free	February 2022
Webinar	ICS stories: Mid and South Essex service line approach A one-hour webinar with Dawn Scrafield, chief finance officer, Mid and South Essex NHS Foundation Trust. This webinar explores a new system service line approach, how the system engaged with clinician and what the opportunities and challenges were.	Free	November 2021

Value

Resource	Links to tools and guidance	Availability	Last updated
Publication	NHS value and efficiency map A reference guide on value and efficiency. This brings together tools and guidance that promote best practice in the efficient and effective use of resources to deliver high-quality sustainable healthcare.	Free	December 2022
HFMA bitesize course	Measuring outcomes and taxpayer value A 10-hour course exploring how different parts of the NHS define and measure outcomes for the patient and value for the taxpayer. This course also considers the tensions between the delivery of competing objectives and service outcomes.	Paid for	August 2022
HFMA bitesize course	Defining value in healthcare A 10-hour course introducing the concept of value in healthcare. This course considers Michael Porter's value equation and Muir Gray's work on the triple value model and looks at how they apply to the NHS.	Paid for	July 2022
Publication	How does a benefits realisation approach support the delivery of value? A briefing which explores why an effective benefits realisation process is important, what a benefits realisation framework might look like and what the critical success factors are. This paper was supported by the HFMA Wales branch but is relevant to value-based healthcare in England as well.	Free	June 2021
Webinar	Harnessing the power of clinical and financial collaboration to deliver value A one-hour webinar which explores how clinicians and finance staff can work together to support improvements in value. It looks at patient-level costing as a rich source of information for clinical teams to understand their patients and services.	Free	June 2020
Podcast	Collaborative working between finance and clinical staff A discussion on the importance of collaboration between finance and clinical staff, including how we can move to a value-based approach. Featuring Lee Outhwaite, director of finance and contracting at Chesterfield Royal Hospital NHS Foundation Trust, and Sanjay Agrawal, consultant in respiratory medicine and critical care at the University Hospitals of Leicester NHS Trust.	Free	March 2020

About the HFMA

The Healthcare Financial Management Association (HFMA) is the professional body for finance staff in healthcare. For over 70 years, it has provided independent and objective advice to its members and the wider healthcare community. It is a charitable organisation that promotes best practice and innovation in financial management and governance across the UK health economy through its local and national networks.

The association also analyses and responds to national policy and aims to exert influence in shaping the wider healthcare agenda. It has particular interest in promoting the highest professional standards in financial management and governance and is keen to work with other organisations to promote approaches that really are 'fit for purpose' and effective.

The HFMA 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 qualifications are delivered through HFMA's Academy which was launched in 2017 and has already established strong learner and alumni networks.

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While every care had been taken in the preparation of this briefing, the HFMA cannot in any circumstances accept responsibility for errors or omissions, and is not responsible for any loss occasioned to any person or organisation acting or refraining from action as a result of any material in it.

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