

FINANCIAL AWARENESS TRAINING — SUPPORTING CLINICIANS: THE SHOW MUST GO ON!!

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ABSTRACT

The finance department at Lancashire Care has always delivered financial training to support budget holders, clinicians and managers. The COVID – 19 pandemic threatened to curtail these important interactions. Understandably financial training wasn't a priority as the pandemic manifested but as the months progressed and a sense of routine developed, clinicians reached out to the finance department to request some financial awareness training. It demonstrated that whilst the NHS has had to cope and manage with the 'greatest threat to mental health since the second world war' (Guardian, Dec 2020), clinical and finance colleagues decided that the show must go on!

This article describes the training that was delivered and how finance departments can still interact and engage with non-finance colleagues during these challenging times.

INTRODUCTION

Finance departments up and down the country were preparing for the busiest time of the year when the pandemic hit. What followed was unprecedented in modern times. Updated guidance for year-end accounts, amended timetables, the temporary suspension of financial/operational planning, contracting and cost improvement programmes (CIPs), and effectively an expenditure led finance regime heading into 20/21. Whilst these challenges were relatively small in comparison to front-line services, finance teams still had a

major supporting role to play to help remove barriers for the care of patients (Healthcare finance, March 2020).

The LSCFT finance teams response to support front-line staff and budget holders was recognised as we were nominated for 'Corporate Team of the Year' in our annual awards ceremony. As we weren't allowed to have the traditional get together a certificate was presented virtually as part of the LSCFT Festival of Celebration.



ENGAGEMENT WITH CLINICIANS

Finance teams are always looking to engage with clinicians and I was delighted when the Associate Medical Director - Older Adults, Prashant Kukkadapu, contacted me to request some financial awareness training for clinicians. This was identified through their medical leadership support group and I agreed to deliver a virtual session in December 2020.

The presentation focused on:

- Commissioning & Income
- Financial Services
- Financial Management

The session was interactive and provided an insight of how the finance function operates using case studies. I started the session by highlighting all the different teams and their functions in the finance department:

- Financial Services
- Financial Management
- Procurement
- Quality & Value Accounting Team (Costing)
- Contracts
- Income

We reviewed how funding flows into our Trust and its source (block contracts and non-contract income) and how that is then allocated to budgets. The training was delivered with reference to the COVID-19 financial arrangements and how that has helped clinicians focus on patient care.

The session also focused on budgeting, forecasting and CIPS, with a discussion on how spending in this year could have an impact on future years. Whilst CIPs were suspended in 20/21 it was important to highlight in the session that going forward the NHS will need to deliver sustainable cost improvement programmes. This will require robust planning and it will be necessary for clinicians, budget holders and finance colleagues to work even more closely together. Using opportunities like this training allows conversations to start early and also plant the seed for future planning. A further training session specifically on budget statements was requested which will be followed-up in the new year.

By mentioning the other functions of the department the medical leadership were sign-posted to other colleagues/ teams in finance with the invitation to take up further awareness sessions in the future. We also shared details of how to access the 'Free HFMA Bitesize Course' through the electronic staff record (ESR) offering further innovative ways of CPD.

Prashant provided some feedback following the training:

“There is significant evidence showing Clinicians involved in management deliver better outcomes for patient care. Finance awareness is an important aspect of management skills but Medical Professionals don’t receive any training in this crucial aspect. The training session Saki delivered to our Medical Managers was well received and helped us to understand how NHS Services are Commissioned, improved our knowledge of financial management including responsibilities as a budget holder, accounts and forecasts, managing budgets and things to consider when planning a Service. I feel regular training sessions and collaborative work between Medical Managers and Network Accountants is absolutely crucial to ensure Services are well planned and delivered by effectively using the resources available.”

The session also prompted our Deputy Medical Director and Chief Clinical Information Officer, Ayesha Rahim to tweet:



Ayesha Rahim
@AyeshaRahimCCIO

Great #CPD session delivered by @saki_iqbal on NHS financial management for medical managers. Absolutely vital skill, delivered in an accessible and lively way 😊 Thanks Saki! Certainly helped fill gaps in my knowledge @MarkPWorth @a_safey @aravinth2009

2:51 PM · Dec 16, 2020 · Twitter for Android

17 Likes

REFLECTION/NORMALITY

Almost a year to the day the country went into its first lockdown, the NHS can look back with immense pride at how as a community we responded to the pandemic. From front-line staff to corporate teams, NHS colleagues across the board have demonstrated resilience and adaptability.

Case studies like this show how the NHS has still focused on business as usual where possible and that it is gearing itself to get back on track.

Whatever normal looks like in the future, finance teams will continue to engage with clinicians and it is more important than ever to ensure relationships are sustained, developed and supported to collectively meet the challenges of the future. There is 'evidence that improving clinical engagement can have positive financial implications for organisations' (BMA, 2017). This engagement will no doubt deliver benefits to patients and to the financial well-being of NHS organisations.

KEY WORDS

Healthcare Finance, Finance Training, NHS, Clinical engagement, COVID-19

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