



A case study to demonstrate how the WbFGA has been used to deliver long term positive health and social care impacts and outcomes - Training and development for Finance Staff.

What is the case study about?

In 2016/17 the UHB staff survey and finance department staff survey which noted the following:-

- No super-numerate training places,
- Training programmes for staff were limited,
- Conferences/training were focused mainly on higher band staff,
- No training strategy to address the high age weighted profile of finance department staff.

The finance staff development programme was developed to address the issues raised. The overall strategy has been developed in discussion with the staff both within and outside of Aneurin Bevan University Health Board as well as external bodies. The analysis, approach and structure undertaken lends itself well to the Wellbeing of Future Generations Act (WbFGA) and the work links across the 5 ways of working and many of the 7 national well-being goals. The attached template begins to map some of the key points and key achievements.

What have you found to be most challenging and lesson learned?

The introduction of the staff development plan was completed and then linked to the Well-being of Future Generations Act ways of working. Ideally future plans would be completed in conjunction with the 5 ways of working and directly links to the 7 well-being goals.

As a result no ambition statements were produced however many of the actions undertaken could be translated into such narratives.

The initial review of the staff surveys enabled the department to set a number of goals based on a local and national context:-

- Relatively high turnover in 2016/17
- Requirement for more holistic approach assessment of skills gaps and requirements in finance.
- Departmental conference feedback and involvement by staff to highlight key improvement areas.
- Liaison with other departments, Health Boards and National bodies to inform approach and develop relevant opportunities.

As a result the training and development programme had four key strands namely:-

- Annual conference
- Quarterly masterclasses



- Available Accountancy body external events
- Webinars and Technical update events

These strands link well to the 5 ways of working as described in the template. It is important to note that the definitions of the 5 ways of working would be slightly different given the non-clinical aspect of this plan. The programme has been developed so it includes all staff groups and all Bands, elements are available for staff from other departments and the annual conference had representation from other Health Boards/organisations which demonstrates the integration and collaboration aspects of the programme.

In addition part of the preventative aspect to this work is to develop a succession which delivers the department's long-term staffing requirement. The department has deliberately recruited additional graduate trainees and appointed students under the Network 75 scheme in addition to supporting current staff in training for professional qualifications. The Health Board will continue to explore mechanisms to maximise the number of staff in training and ensure that the finance function continues to develop its staff for future succession planning.

Next steps:

- Further actions will be required to ensure sustainability for the future.
- A review of current actions, progress and achievement will be required in both the short and medium-term. This will allow flexibility in the strands as necessary.
- On-going review against both the ways of working and well-being goals will be useful to ensure the programme meets the sustainability ambitions of the Health Board.

How applying the Sustainability Principle and the 5 Ways of Working is helping in the training and development of finance staff

Long Term



To improve all finance staff skills and improve the skills of non-finance staff. To build a succession plan and develop training posts since initial survey suggested a gap if current qualified post-holders retired or left.

Prevention



Raise understanding across ABUHB and NHS Wales of finance skills. This includes both “hard” finance techniques but also some of the softer skills required to develop our culture to improve overall value for money. The aim is to prevent skills shortages / gaps given previous level of turnover and risk areas.

Integration



Supports overall NHS Wales finance academy vision as well as linkages to programmes both within ABUHB but also National policies such as; the Well Being of Future Generations Act (Wales) 2015. The development of Network 75 roles has specifically focussed on staff from the Gwent region.

Collaboration



A range of partners both internal to ABUHB but also external accountancy bodies, private partners and other NHS organisations led by Aneurin Bevan University Health Board have been involved to ensure a collaborative approach, for example staff from other organisations and Divisions attend the annual finance conference.

Involvement



The finance staff development programme has involved staff from across finance as well as considering views from other departments and the approaches taken from other organisations particularly those deemed successful in their approach. This has been completed through surveys, on-going steering groups and remains flexible to ensure relevance to the local and national agenda.

“The core skills sessions are extremely useful to staff who are not used to dealing with financial information.”

ABUHB staff member

NHS Finance Academy:

“ABUHB are a key supporter of our national programme of work.”

Words of staff undertaking training:

“The department are supportive of my studies and encourage me wherever possible to achieve my qualifications....”

ABUHB staff member

How training and development for Finance staff will positively impact all seven Well-being Goals

The finance department need to share and develop good financial management from across Wales and at a global level. The tailored approach depending on Band and experience is used in conjunction with National and accountancy bodies.

The VALUE Agenda is aligned to Prudent Healthcare both internationally advocated approaches. ABUHB is considered the leading HB in Wales implementing 'Value' based approaches from Finance and sharing with others.

- Welsh Awareness Training provided for all staff
- Bespoke Welsh Language training and support where requested.

We have **3 Network 75 trainees and 3 graduate finance trainees with a further 8 staff undertaking qualifications with professional accounting bodies.**

The training undertaken by these staff will aim to bridge the gap as we lose qualified staff over the next 5-10 years.

"The finance staff development programme should reduce the risk of skills shortages over the short, medium and long-term. It will also build on good practice and progress our department especially as the 'value' agenda increases and service pressures increase." **ABUHB Assistant Finance Director**

"...it is important to have a wide range of training opportunities available to encourage learning and best practice" **Finance staff member**

Training and development programme well supported!
The masterclasses which are part of the training programme have been well attended with regular attendance of 20-30 staff members. The annual finance staff conference regularly has around 80 delegates from both within and outside ABUHB.

The training provided through conferences, masterclasses, external events and webinars has encouraged increased training and promotion within the department.

"The Network75 scheme hosted by ABUHB has provided me with many opportunities to develop my career in finance, I have gained so much experience during my time here which is invaluable. "

Network 75 Programme Trainee

All staff can apply for funding towards training identified in their PADR.

Graduates from across the UK and further afield apply to the NHS Wales finance graduate scheme. A number of the selected graduates may not have degrees directly related to accountancy.



All staff complete equality and diversity training.

"The masterclasses and 'lunch n' learn' events have increased my knowledge of other departments within finance encouraging me to think about working there in the future". **Member of finance staff**

