

# A Regional Health Authority Perspective

## Stepping up

Development centres run by the NHS Executive have been helping finance managers to prepare for possible future roles as finance directors in new primary care trusts.

### The Challenge

Over 120 new primary care trusts (PCTs) will be formed on 1 April and finding the right people to lead these organisations will be key to their success. But finding people with the right skills will not be easy. PCTs, unlike health authorities or NHS trusts, have a dual commissioning and provider role. This means directors of finance in PCTs will need both commissioning and providing skills as well as an understanding of the issues relating to primary care.

To help meet this training and development need the NHS Executive's London regional office, on behalf of NHS Executive headquarters, agreed to develop a

programme to help prepare senior NHS finance staff for the role of PCT director of finance. This programme would give individuals an understanding of the role and help them identify the competencies they need to develop to be a successful finance director.

### Time was short

There were only six months before the first PCT director of finance posts would be advertised. A steering group was established and quickly put to work. A competency framework, together with a project specification for the development centres were quickly established.

The competency framework was based on the skills required by current health authority and trust finance directors with some additional requirements around primary care. It covers both the technical and personal competencies necessary to underpin the performance of a finance director.

The steering group agreed to run


the development centres as two-day residential events but deciding on the content was more difficult. The development centres would need to include workshops covering the role of a PCT finance director, exercises on personal development and a one-to-one feedback session. The programme also needed to give delegates time to reflect on their current skills and abilities. It was a lot to fit in to two days.

A project specification was finally agreed and interested organisations were invited to tender for the design and delivery of a development centre. Following a selection process, TDP Development was awarded the contract.

### TDP Development Get Involved

The programme prepared by TDP invited participants to consider:

- the role of a PCT finance director
- the competencies required to carry out that role and
- their own personal style.



Once the outline programme for the development centre had been drawn up by TDP a number of meetings were scheduled to agree the detail. At the first of these meetings, staff from TDP met with finance directors from PCTs and health authorities to build a simulation 'in-tray' exercise. Getting this exercise right was vital as it was designed to give course participants an idea of what it would be like being a PCT finance director and the type of work they would face on a day-to-day basis. The input from current PCT finance directors ensured the exercise was both stimulating and realistic.

At the same time other staff from TDP were busy designing and agreeing the content of a 360-degree appraisal. This was a questionnaire, to be completed prior to the course, by the line managers, colleagues and staff of course participants. The aim of the questionnaire was to identify the strengths and weaknesses of the individual being appraised. Results of the 360-degree appraisal would be shared with individuals at the development centre and then used to inform a personal development plan.

While the programme included one-to-one interviews with TDP staff it was also considered important to give delegates the opportunity to discuss their development with NHS staff. A group of NHS finance directors were trained to act as observers at the development centre and to give feedback to course participants.

### Web Site for Participants

Back in the office TDP staff were busy designing a dedicated website for course participants. The website was designed with a number of objectives. Initially course participants could access the site to find out more about the development centre. There was a timetable with information on each of the sessions, a questions and answers page and details on the hotel where the event would be held. Then, at the end of the two-day event the website developed a new role enabling course participants to share experiences and keep in touch through an on-line discussion forum.

With all the design preparation in hand it was time to plan the delivery. Although London took the

lead on designing the development centres, each region considered whether and how to arrange delivery of the programme locally. In London, the contract to deliver the programme was also awarded to TDP Development. It was decided to run three events with 8-12 delegates at each one. A letter and application form was sent out to all London NHS organisations. Following a brief short-listing process the first delegates were identified.

Twenty-seven finance staff went through those first three centres. They represented a broad spectrum of the finance function. Finance directors, deputy directors, assistant finance directors, heads of finance and finance managers were all represented. Participants came from all types of health body including primary care groups, health authorities, NHS trusts and the regional office.

### The First Centres Are Run

Just four months after the first steering group meeting everything was ready. The design of the course was completed, the date of the first event was fixed and the



first delegates confirmed. All we could do now was sit back and wait. Was the balance of the programme right? Would the centre achieve the aims set by the steering group? Would it be a success?

Initial feedback came by word of mouth. Some participants phoned and said the programme was exhausting but very worthwhile. This positive response was later confirmed by the comments on the evaluation forms.

Perhaps the real measure of success will come in seeing some of those who have been through the development centres being appointed as PCT finance directors either in April or in subsequent waves. But it will not be the only indicator of success. Some candidates have realised, through attending the development centres, that this is not the role for them. This too has to be counted a success as it helps them to clarify their career paths.

With the development centres now rolled out across several other regions, the mystery surrounding the top finance job in the new

primary care trusts is being dispersed. And the job of recruiting this new tier of finance directors should become that much easier.