

NHS Finance Insights Placement Scheme

Employers Handbook



Foreword

The aim of this document is to support host organisations and placement managers to deliver consistent, high-quality placements across all regions. The content in this handbook is provided as guidance, and we acknowledge that approaches may differ by region and organisation.

The NHS Finance Insights Scheme sits alongside local and national apprenticeship and graduate pathways by offering an early introduction to careers in NHS finance. Providing valuable work experience to young people from lower socioeconomic backgrounds and helps to break down barriers by opening doors for those who may be disadvantaged and are underrepresented within NHS finance. The scheme aligns with the goals set out in the NHS Finance EDI action-plan, specifically addressing the objective of cultivating a workforce that reflects the diversity of the communities we serve, ultimately striving for NHS finance leadership roles to mirror the diversity of our local populations.

The scheme gives host organisation’s additional finance capacity at low cost, providing them with an individual who has demonstrated an eagerness to learn and a genuine interest in developing a career within NHS finance. In turn this is supporting the development of future talent and building a pipeline of staff already familiar with NHS systems and culture. It attracts diverse candidates and supports social mobility in local communities. Bringing fresh perspectives and digital skills into finance teams, whilst demonstrating an organisation’s commitment to inclusion, development, and community impact.

What a successful placement looks like

The NHS Finance Insights Scheme aims to provide trainees with a positive and meaningful introduction to a career in NHS finance, while supporting organisations to develop future talent. A successful placement should:

- Provide a welcoming, inclusive and supportive experience for the trainee.
- Give exposure to a range of NHS finance functions through at least two finance rotations.
- Include meaningful work, development opportunities and regular supervision.
- Support the trainee to build confidence, workplace skills and an understanding of NHS finance.
- Enable completion of the placement portfolio and participation in programme activities.
- Help the trainee make informed decisions about their next steps, whether that is employment, an apprenticeship, further education or professional qualifications.
- Deliver value to the host organisation while contributing to the development of a more diverse future NHS finance workforce.

Joining as a host organisation

Joining the scheme as a host organisation is a simple 2 step process.

1. Provide an expression of interest to your regional lead.
2. Confirm your commitment by [signing the MOU](#).

Please note, once you sign the MOU you are committed to taking on a placement trainee and we will be working to pair you with suitable interview candidates. When organisations pull out at the last minute it can be very disappointing for candidates who have worked hard on their applications and are preparing for interviews.

To ensure the recruitment phase of the scheme is completed on time, there is a timeline which sets out key milestones and a deadline by which organisations must withdraw if necessary. [View the 2027 timeline here.](#)

Recruitment

Once the host organisation has committed to taking on a trainee, it is their responsibility to support the regional lead in recruiting for the role. As outlined in the MOU, support would include contacting and promoting the scheme to 4 – 5 schools or colleges within a commutable distance to your organisation.

- Support in the recruitment process can include:
- Engaging with schools, colleges and community groups, either directly or through local partnerships, to raise awareness of the scheme
 - Attend careers fairs or insight events, sharing real examples of NHS finance roles
 - Champion the scheme within their organisation, encouraging colleagues to participate in shadowing, mentoring or hosting rotation placements

Tip: Contact your colleagues as many will be parents and can link you in with local schools, and there will be mental health support and nurses who work in schools.

The criteria that each applicant must meet is highlighted below:

- You have the right to work within the UK and will be able to prove this if offered employment within an NHS organisation.
 - Attending state school or college, or have been in full-time education within the past three years, minimum Grade C / 4 in GCSE Maths is desirable but not essential, and You have not attended university and are not planning on attending.
 - The main person who earns money in your household has a job that is classed as lower socio-economic background. And or; you have been eligible for free school meals at any time in the last 6 years.
- What this means:*
- » Lower socio-economic background usually means the main earner in your household has a lower income, fewer qualifications, or works in a lower-paid or less secure job.
 - » Free school meals are a government benefit for pupils whose families receive certain benefits. This does not include meals provided in other ways, such as boarding school.

Although the scheme primarily targets recent school and college leavers, there is no upper age limit; applicants are eligible as long as they have been in full-time education within the last three years.

Some key dates for onboarding and recruitment to keep in mind as a host organisation are highlighted below:

- [MOU signed by the 18th December](#)
- [Insights Webinar for organisations in October](#)
- [Placement manager training in March](#)
- [National and regional shortlisting May – June](#)
- [Interviews take place end of June – early July](#)
- [Onboarding mid – July – August](#)
- [Placement starts at the beginning of September](#)

Once the applications are closed the central team will conduct an initial shortlist to ensure all applicants are eligible. If eligible, the applications will be sent to the regional lead, to shortlist based on their application and location.

Your regional lead will send each organisations a list of candidates that are eligible and within a commutable distance. It is then the host organisations responsibility to decide who they would like to see at interview stage, and to work with their regional lead to inform candidates of the outcome.

Interviewing

It is the responsibility of the organisation and placement manager to conduct interviews for all shortlisted candidates in a timely manner. Interviews will need to be completed, and Wthe regional lead will notify all candidates if the outcome by early July.

As a host organisation you will be required to produce a job description for the placement you are offering. We have provided a template as a sample job description, but you will need to tailor this to ensure it aligns with what you will be offering within your placement, and it will need to be completed ahead of interviews taking place. [View the job description example here.](#)

HR and onboarding

The onboarding process varies between organisations and can often be a lengthy process. To ensure that this stage of the recruitment process runs smoothly it is recommended that the placement manager is in contact with their HR department and are clear about what documentation and references are needed before the interview takes place.

Tip: Communication between placement managers, HR and the regional lead will ensure this process runs smoothly.

Being clear on HR requirements for onboarding before the interviews take place, means that shortlisted candidates can be asked to have all documents ready to be shared at the interview. This may differ in each organisation, so be clear on your organisations processes.

Once the trainee has been successfully onboarded the HR responsibilities for the duration of the placement are with the organisation. If the trainee leaves the placement early the placement manager will conduct an exit interview and gather feedback to report back to the central team.

References

Contact details of references will be provided by each candidate when they apply, but it is your responsibility to contact the referees and gather the references.

Many referees will be teachers and therefore will be on holiday when interviews are due to take place. We have highlighted to applicants that references will be collected between June-August and asked them for personal contact details of each referee if necessary.

Tip: Verbal references may be applicable, check with your dedicated recruitment team first before gathering them.

What to do if you have an excellent candidate but are struggling to reach their referee:

- Speak with your HR team to see what your internal processes are.
- They may be able to join on the condition that you will eventually receive a reference and if you don't receive a suitable one then they can be let go.
- The effort that the applicant goes to, to gather their reference can be an indication of whether they are right for the role.

Please note these are suggestions and each organisation must check what their internal processes are.

Placement manager role

The Placement Manager plays a central role in ensuring the trainee has a positive, structured and meaningful experience throughout their 12-month placement. They act as the trainee's main point of contact, provide day-to-day guidance, coordinate the placement timetable, and ensure the host organisation meets all scheme expectations.

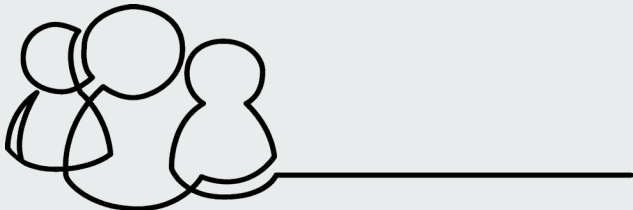
Key responsibilities include:

- Offering a supportive and inclusive environment where the trainee feels welcomed and able to learn
- Providing structure, regular supervision like weekly 1-2-1s, and clarity around tasks and expectations
- Ensuring the trainee has opportunities to work across different areas of finance and complete their [placement portfolio](#)
- Liaising with the regional lead and attending relevant meetings or briefings
- Acting as the link between the trainee, their rotation supervisors, and the wider team

Expectations of Placement Managers during the placement

Once the trainee has joined the organisation, the Placement Manager becomes their primary day-to-day support and will be the main point of contact for the trainee and regional lead throughout the full 12-month placement.

It will be the placement manager who creates a plan for the 12-month period which will ensure that the team and the trainee know what to expect and when throughout the placement. The placement manager will ensure that everything is prepared ahead of the trainee starting.



Some key roles of the placement manager throughout the 12-months are highlighted below.

- Delivering a structured induction, ensuring the trainee understands expectations, confidentiality and workplace conduct
- Coordinating introductions and handovers to each line manager across different rotations
- Supporting the trainee to complete their placement portfolio, ensuring that tasks and experiences align with competencies
- Providing a safe, inclusive and welcoming environment, and escalating any concerns to HR or the regional lead
- Holding regular check-ins or supervision meetings to monitor progress, wellbeing and development
- Ensuring the trainee has access to a range of meaningful activities and receives timely feedback
- Keeping the regional lead updated and attending regional working groups or national sessions where required

Support for Placement Managers

Although the placement manager is the key point of contact and will be managing the placement delivery, they are not expected to do this alone and there are multiple support routes.

- Regional working group meetings – shared learning, peer support, updates and opportunities to connect with other host organisations
- National ONF support – resources, guidance documents, training sessions
- Regional leads – point of contact to ask for any support throughout the placement.

Placement Managers are encouraged to make full use of the support provided specifically the regional network meetings if available to ensure a consistent and high-quality experience for their trainee.

Preparing for placement

Preparing for the trainee's arrival is essential for building confidence and ensuring the placement gets off to a smooth start. By having a plan in place, it ensures that the trainee and the host organisation gets the most out of this experience.

Placement Managers should:

- Confirm placement dates, check workspace availability and ensure all required IT access or equipment is arranged
- Brief the finance team, outlining the purpose of the scheme and what support may be needed
- Identify colleagues across the department who can offer shadowing, short projects or mentorship
- Prepare an outline plan for the first week, including key meetings, introductions and induction tasks
- Hold an informal welcome meeting to set expectations and explain confidentiality and conduct
- Provide a short orientation to NHS finance, including structures, financial flows and reporting cycles
- Draft a 12-month plan, showing which teams the trainee will work with, what skills they will develop, and how this aligns with the portfolio
- Build a balanced programme of shadowing, hands-on work and observation, such as:
 - » Attending budget-setting sessions
 - » Observing month-end reviews
 - » Supporting simple analysis or data entry (with supervision)
 - » Meeting colleagues in clinical, operational or corporate teams
- Consider what success will look like at the end of the placement and build opportunities into the placement plan to help the trainee achieve these outcomes.

Example placement timeline: ▪ Month 0–1: Onboarding, ID checks, Trust induction, mandatory training ▪ Month 1–3: Shadowing & introductory tasks ▪ Month 3–6: Rotation 1 (+ portfolio building) ▪ Month 6–9: Rotation 2 ▪ Month 9–12: Final rotation, career planning, academy support, exit review ▪ Month 12: Portfolio completion + certificate View Example Rotation Structure Template here	look like: ▪ Understand place of work – In the office, or hybrid ▪ Meet Line Manager(s) ▪ Identify Workplace Buddy ▪ Complete Trust induction ▪ Complete mandatory training (H&S, fire, manual handling, information governance) ▪ Confirm working hours and flexi-time rules ▪ Understand dress code ▪ Set three initial goals ▪ Access email, systems, software, shared drives ▪ Understand how to report sickness/absence
An example of what your trainees' first week might	

Employment contract and salary

Trainees are employed on organisational terms and conditions, and Placement Managers should ensure clarity for both the trainee and HR team. The contract will be a 12-month fixed-term contract with a salary of band 2

Working arrangements must be made clear to both the trainee and the teams they will be working with. The trainee should not be working 5-days a week remotely and it is recommended that an office-based or hybrid working approach is used.

If you are going to using a hybrid working approach, then the trainees should be onsite for the first two weeks to build confidence and relationships with the team.

Tip: When the trainee starts working remotely, expectations should be clearly outlined and included in the contract.

Annual leave, attendance and expenses

Trainees are employees of the host organisation and should be managed in line with local employment policies and procedures. Placement Managers should ensure that trainees understand their entitlement to annual leave, how to request leave, and any local processes relating to attendance and absence.

Annual leave and attendance

As many trainees will be entering employment for the first time, it is important that expectations around attendance and annual leave are discussed early in the placement.Placement Managers should:

- Explain annual leave entitlement and local booking procedures during induction.
- Encourage trainees to plan leave in advance, particularly where rotations or training activities may be affected.
- Ensure trainees understand local arrangements for reporting sickness or other unplanned absences.
- Discuss any planned study days, open days, interviews or career events that may arise during the placement and how requests for time away from work should be managed.
- Familiarise trainees with local flexible working arrangements, where applicable.
- Reinforce the importance of maintaining good attendance and communicating any concerns at an early stage.

Travel and expenses

Placement Managers should ensure trainees understand what expenses can be claimed and how claims should be submitted in line with local organisational policy.This may include:

- Travel expenses associated with attending approved training events, conferences or placement-related activities.
- Subsistence expenses where applicable under local policies.
- Reimbursement arrangements and required documentation for claims.
- Any approval processes that need to be followed before travel is booked.

Supporting participation

The NHS Finance Insights Scheme aims to remove barriers to career opportunities and support social mobility. Placement Managers should consider whether there are practical barriers that could affect a trainee’s ability to participate fully in the placement, training activities or development opportunities and seek advice from HR, the regional lead or the ONF central team where additional support may be required.

Apprenticeships during the placement

Trainees may wish to start their qualification part-way through the year. This is something that we would encourage, but understand that each organisation would have a different approach to this request. Placement Managers should discuss this with HR before the placement starts so they are clear on the organisational policy and can encourage and support the trainee if this is something they want to pursue.

Hints & tips for successful placements:

- Plan ahead – even a simple initial schedule helps the trainee feel valued
- Set realistic expectations – allocate manageable tasks and gradually increase responsibility
- Be patient – many trainees have limited prior experience
- Encourage broad exposure – introduce them to wider teams to show how finance supports patient care
- Celebrate milestones – acknowledging progress builds confidence
- Promote curiosity – encourage questions and reflective learning

Should your placement not go as planned for any reason, please ensure that you reach out to your regional lead to raise any concerns. The regional lead and the ONF Central team are available to support throughout the 12-month placement.

Rotation schedule

To offer a well-rounded experience, all placements must include at least two rotations across different areas of finance. This ensures the trainee develops a broad understanding of the finance function and gains sufficient experience to complete their portfolio.

Common rotation areas include:

- Management Accounts
- Financial Accounts
- Costing

- Procurement
- Contracting
- Finance Systems
- Business Partnering

When arranging the rotations please keep in mind busy periods for different teams such as year-end to ensure that trainees are not rotated into a team during a busy period which can lead to team members not having sufficient time to ensure they have a beneficial experience.

Training and development

Professional development is a core part of the scheme, and trainees should be supported to access training and networks that help build confidence and capability.

This includes:

- Attendance at ONF, HFMA, SDN, and other regional training or conferences
- Support with travel expenses for training, where not covered regionally and in line with organisational policy
- Assigning a mentor or buddy within the organisation
- Encouraging trainees who wish to begin AAT, providing guidance on feasibility and organisational policy
- Sharing information about career pathways, entry-level roles and future training opportunities

External support

King’s Trust

Trainees on the NHS Finance Insights Scheme are supported by The King’s Trust, who provide additional personal and professional development opportunities.

This includes:

- Pre-placement and in-placement employability training
- Access to a youth worker or mentor for independent support
- Workshops on wellbeing, confidence-building and workplace readiness
- Additional pastoral support for trainees who may face challenges during the year
- Some financial support in the first month of the placement

This wraparound support helps ensure trainees feel confident and capable as they transition into a professional environment.

For trainees to be eligible for this support they must sign up and attend an onboarding event in August. Information will be circulated at the time and it is the placement managers role to encourage their trainee to engage with this.

AAT

Trainees will have access to AATs virtual work experience website, which can be accessed via the below link.

[AAT | Hub powered by Springpod](#)

Kaplan

Should the host organisation decide to not employee their trainee on a full-time basis following the 12-month placement and ONF are unable to place them elsewhere within the NHS. Kaplan have offered support through their recruitment team.

Please get in touch with the ONF Central team at one.finance@nhs.net to connect your trainee with the Kaplan team.



End of placement support

As the placement comes to an end, we need to ensure that trainees feel supported in making decisions about their next steps.

It is recommended that conversations to provide trainees with support happen at least 6-months into the 12-month placement so trainees start to understand what they would like to do and how you can support them. Whether that is retaining talent where roles are available or assisting with networking to the wider regions if roles are not available, or looking for support in moving into an apprenticeship or further study.

As the placement comes to an end the placement managers should understand their trainees aspirations and the next steps should be clear. Whether that is a secured role, an apprenticeship, or further education etc.

Some key things for you to do as a placement manager are:

- Conduct an end-of-placement debrief, covering what the trainee has learned, their achievements, and areas for further development
- Ensure the trainee completes and submits their placement portfolio
- Provide advice on next steps, such as applying for local apprenticeships or entry-level roles
- Offer a reference, where appropriate
- Celebrate the trainee's contribution to the team and acknowledge their progress over the year

The final role of the placement manager is to ensure that both the trainee and placement manager feedback is completed so the central team can continue to develop and improve the scheme for future cohorts.

