

SOUTH WEST REGIONAL FINANCE ACADEMY

NHS FINANCE ACCESSIBILITY GUIDANCE AND CHECKLIST

INTRODUCTION

Accessibility is about making sure everyone can fully participate, regardless of disability, neurodiversity, health conditions, language needs or preferred ways of working. Many accessibility improvements are simple to implement and often benefit everyone.

The South West Finance Academy Inclusion & Diversity Ambassadors identified a need for a simple, practical guide to help finance colleagues make their work more accessible. While accessibility is often associated with specialist knowledge or significant adjustments, many of the changes that have the greatest impact are straightforward, easy to implement and benefit everyone.

Whether you are writing a board paper, building a spreadsheet, running a meeting or sending an email, small changes can make information easier to understand, navigate and engage with. Accessible ways of working can support colleagues with disabilities, long-term health conditions and neurodivergent colleagues, including people with ADHD, autism and dyslexia. They can also improve clarity, efficiency and collaboration for all staff.

This guide has been designed as a practical tool rather than a policy document. It focuses on simple actions that can be built into everyday work across NHS finance teams. You do not need to implement everything at once.

Even adopting one or two improvements can make a meaningful difference.



SPREADSHEETS

WHY IT MATTERS

Finance teams rely heavily on spreadsheets. Accessible spreadsheets help colleagues find information quickly, reduce errors and improve usability for screen reader users and people with visual or cognitive differences.

- Use clear column headings.
- Keep layouts simple and logical.
- Avoid excessive use of merged cells.
- Use sufficient colour contrast.
- Freeze header rows and key columns where helpful.
- Clearly label charts and tables.
- Avoid using colour alone to indicate status or performance.
- Include notes or explanations for complex calculations where needed.

Team action: _____

FINANCE REPORTS, BOARD PAPERS AND BUSINESS CASES

WHY IT MATTERS

Important decisions are often based on these documents. Making them accessible helps board members and stakeholders understand key messages quickly and ensures everyone can engage with the information effectively.

- Include a clear executive summary.
- Use headings and a logical document structure.
- Explain acronyms and technical terminology.
- Present key financial messages in plain English.
- Ensure charts and graphs can be understood without relying on colour alone.
- Include narrative alongside complex financial tables.
- Keep recommendations and decisions clear and easy to identify.

Team action: _____

MEETINGS AND EVENTS

WHY IT MATTERS

People absorb and process information differently. Small adjustments can make meetings more inclusive and enable everyone to contribute confidently.

- Include an agenda in Teams invitations, even if it is only a few bullet points.
- Share papers and presentations in advance where possible.
- State the purpose and expected outcomes of the meeting.
- Allow time for questions and reflection.
- Encourage use of the chat function for those who prefer not to speak.
- Be mindful that some colleagues may need longer to process information before responding.
- Repeat questions and comments so everyone can hear them clearly.

Team action: _____

PRESENTATIONS

WHY IT MATTERS

Accessible presentations help audiences focus on the content rather than struggling to read slides or understand visual information.

- Use a high-contrast colour scheme.
- Limit the amount of text on each slide.
- Use clear and simple language.
- Avoid cluttered slides and excessive animations.
- Verbally describe important charts, images and visual information.
- Share slides in advance where possible.
- Use accessible templates.

Team action: _____

MICROSOFT TEAMS ACCESSIBILITY FEATURES

WHY IT MATTERS

Microsoft Teams includes several built-in accessibility tools that can improve participation and remove barriers for colleagues.

- Use live captions during meetings.
- Encourage use of accessibility tools and keyboard shortcuts.
- Record meetings where appropriate so colleagues can revisit discussions.
- Use meeting chat to support different communication preferences.
- Share agendas and documents within meeting invitations.
- Enable transcripts for important meetings where available.

Team action: _____

ACCESSIBLE EMAIL PRACTICES

WHY IT MATTERS

Emails remain one of the main ways we communicate. Clear, accessible emails reduce misunderstandings and make important information easier to digest.

- Use meaningful subject lines.
- Keep messages concise and well structured.
- Use headings and bullet points where helpful.
- Avoid large blocks of text.
- Use descriptive hyperlink text.
- Clearly identify actions, owners and deadlines.
- Attach accessible versions of documents where relevant.

Team action: _____

SUPPORTING COLLEAGUES WITH ADHD, AUTISM AND DYSLEXIA

WHY IT MATTERS

Many neurodivergent colleagues bring valuable strengths to NHS finance. Simple adjustments can improve understanding, reduce stress and support participation.

- Provide agendas and information in advance.
- Be clear about expectations and deadlines.
- Use plain, unambiguous language.
- Summarise actions at the end of meetings.
- Allow different ways to contribute, such as chat or written feedback.
- Avoid unnecessary last-minute changes where possible.
- Break complex information into manageable sections.

Team action: _____

INCLUSIVE COMMUNICATION

WHY IT MATTERS

Clear communication helps everyone understand what is expected and feel included in conversations and decision-making.

- Use plain English and minimise jargon.
- Explain acronyms when first used.
- Be clear about actions, responsibilities and deadlines.
- Consider different communication preferences.
- Avoid unnecessary urgency where possible.
- Ask colleagues whether adjustments would help them participate fully.

Team action: _____

DOCUMENTS

WHY IT MATTERS

Accessible documents are easier for everyone to read, understand and navigate. They are particularly helpful for colleagues with visual impairments, dyslexia, cognitive differences and those using screen readers.

- Use high colour contrast, for example, dark text on a light background.
- Use a clear, readable font and avoid very small text.
- Structure documents using headings and subheadings.
- Use bullet points where appropriate to break up large amounts of text.
- Avoid using colour alone to communicate important information.
- Add alternative text to images, graphs and diagrams.
- Ensure hyperlinks have meaningful names rather than displaying long web addresses.
- Check that documents are accessible before sharing them where possible.

Team action: _____

EVERYDAY INCLUSIVE PRACTICE

WHY IT MATTERS

Accessibility is most effective when it becomes part of everyday working rather than something considered at the last minute.

- Build accessibility considerations into planning from the start.
- Do not assume everyone’s needs are the same.
- Create an environment where people feel comfortable requesting adjustments.
- Listen to feedback and continue to improve.
- Remember that accessibility benefits everyone.

Team action: _____

ACCESSIBILITY SCORECARD

For each area, tick one box to show your team's current position.

Area	Ready	Developing	Not started
Spreadsheets	☐	☐	☐
Finance Reports, Board Papers and Business Cases	☐	☐	☐
Meetings and Events	☐	☐	☐
Microsoft Teams Accessibility Features	☐	☐	☐
Presentations	☐	☐	☐
Accessible Email Practices	☐	☐	☐
Supporting Colleagues with ADHD, Autism and Dylexia	☐	☐	☐
Documents	☐	☐	☐
Inclusive Communication	☐	☐	☐
Everyday Inclusive Practice	☐	☐	☐

FURTHER INFORMATION

Website: **onenhsfinance.nhs.uk**

Email: **one.finance@nhs.net**

REGIONAL FINANCE ACADEMY | SOUTH WEST

The South West Finance Academy is a stand alone body that supports training and development across the region. We are here to give everyone in the South West a chance to learn and grow together through our inclusive training and development opportunities. The South West Finance Academy is responsible for ensuring a tailored approach to finance skills training, development and networking. We work to bring together all delivery partners.

ONE NHS FINANCE

One NHS Finance brings together the Future-Focused Finance, National Finance Academy, and the Finance Innovation Forum programmes and networks to make sure that everyone working in NHS Finance has access to skills, knowledge, methods, and opportunities to influence and enhance patient services.