

# ACCREDITATION PROCESS GUIDE

The Future-Focused Finance accreditation system is designed to allow the NHS Finance Leadership Council (FLC) to give due recognition to those NHS organisations that have the very best finance skills development culture and practices in place. It is based on North West Skills Development's successful and long-standing Towards Excellence accreditation process.

There are three levels within the process. They reflect the continuous development of the organisation's finance function, with level three recognising the highest standards of financial competence and commitment to the skills development of the finance team. Level 1 will be achieved through a process of self-assessment with verification from the organisation's Finance Director / Chief Finance Officer. Levels 2 & 3 will require peer-assessment by a colleague from another accredited organisation.

## OVERARCHING PRINCIPLE:

The organisation is engaged with Future-Focused Finance's aim of connecting and developing all NHS Professionals. This is demonstrated by adherence to each of the criteria in the accreditation document.

## GUIDANCE:

Organisations should collate an evidence proforma which includes a brief statement against each criterion of the evidence being provided to support the application for accreditation at the appropriate level. This does not need to go into extensive detail, but should clearly demonstrate that the criterion has been met. Blank proformas for this purpose can be downloaded from the FFF website.

- When applying for Level 2 accreditation, organisations must also include their up to date evidence for Level 1. Similarly, for Level 3 accreditation, evidence must be submitted across all three levels to ensure it is current. Evidence can be collated electronically or physically. Examples of evidence might include meeting minutes, notes, organisation charts, audit reports, anonymised PDR/ Appraisal forms, case studies, records of discussions with staff, etc. One piece of evidence may be counted towards more than one criterion.
- For level 1 accreditation, the organisation should submit its completed evidence proforma to the FFF team on [futurefocusedfinance@nhs.net](mailto:futurefocusedfinance@nhs.net) along with a statement from the finance director / chief finance officer confirming that all the relevant criteria have been achieved by the organisation. The FFF team will review a sample of the submissions to ensure that the relevant standards are being maintained. There is no requirement to submit the evidence itself, though the FFF team may ask for certain items to be submitted to verify achievement of the level.
- For level 2 and level 3 accreditations, organisations should notify the FFF team that they wish to be accredited and the team will work with FSD colleagues, to allocate an assessor to visit the organisation and to review the evidence with them. Accreditation will be awarded following completion of a review and the submission of a brief report by the assessor to the FFF team.
- The role of the assessor is pivotal to the accreditation process. Initially FFF will work with colleagues from FSD NW to ensure that the knowledge and experience gained through their operation of the Towards Excellence scheme is shared across the wider NHS. A series of knowledge sharing events will be arranged at which interested parties will be introduced to the role of the assessor. To ensure a supply of assessors all organisations applying for accreditation will be required to provide a member of their finance team to take on the role.

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- Assessors will normally work in strategic roles where they understand the breadth of NHS finance. Assessors will possess excellent leadership skills, being prepared to tackle differences in interpretation of the evidence provided between an organisation's finance staff and its leadership team. They will be able to communicate effectively their findings and be consistent in applying the evidence. They must be prepared to meet with fellow assessors to share best practice and provide peer support and to ensure that the scheme is owned by the finance profession. There are real benefits to being an assessor, including exposure to good practice at other organisations. We will go into much more detail about this at the knowledge sharing events referred to above.
  - Accreditation will expire after 3 years. Organisations will be expected to maintain continuous accreditation, so should plan for reassessment as the expiry date approaches. However, should expiry occur, a time frame will be agreed for organisations to submit for re-accreditation, within a grace period of 6 months. Organisations that do not become re-accredited during this period will no longer be accredited and will be expected to restart at Level 1.
  - Smaller organisations – especially CCGs – are encouraged to form consortia to seek accreditation, as it is recognised that some of the criteria may be difficult to achieve in organisations with few staff.
  - NHS shared service organisations will be eligible to apply for FFF accreditation if they can demonstrate that they operate as a stand-alone organisation. This may be demonstrated by a level of autonomy in the business planning and operation of the organisation, the existence of a management board comprising members drawn from those organisations that use the service and service level agreements with client organisations. However, the FFF team will consider other reasons to allow a shared service organisation to apply for accreditation.
  - The Finance Leadership Council (FLC) will formally sign-off the FFF team's recommendations that organisations should be accredited, and at which level, at its regular meetings. Organisations will be informed in the week following the FLC meeting at which they are accredited and they will be sent a certificate to acknowledge their status.
  - It is recommended that, wherever possible, in order to celebrate organisations' successes, certificates of accreditation should be formally presented at a suitable local meeting (e.g. finance directors' communication meeting, FSD or HFMA branch conference, etc.).

## **The Finance Leadership Council**

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