

Introduction

Crossing Professional Boundaries

A toolkit for collaborative teamwork

TheKingsFund >

MAKING PEOPLE COUNT



**FUTURE
FOCUSED
FINANCE**



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Welcome

- The financial challenges in the NHS, laid out in the Five Year Forward View, face every organisation, in every part of the NHS.
- **Future-Focused Finance** is about 'Making People Count' by ensuring that everyone connected with NHS finance has access to the relevant skills, methods and opportunities to influence decision-making in support of the provision of high quality patient services. This includes those directly involved in using NHS resources - our clinicians, and our patients and communities, as well as finance staff at every level.
- Teams that work better together create better outcomes for patients. This toolkit is designed to help NHS organisations assess the health of working relationships across their organisations, particularly between clinicians and finance staff. The toolkit helps you understand how well your teams engage with each other and gives you a route to finding ways to improve collaboration.

Who's the toolkit for?

The toolkit is for leaders from NHS clinical and finance teams who want to encourage collaboration across professional boundaries.

Who's produced it?

The toolkit has been jointly produced by Future-Focused Finance and The King's Fund. The tools have been informed by research evidence, best practice, and feedback from the pilot sites.

The King's Fund is an independent charity working to improve health and care in England. We help to shape policy and practice through research and analysis; develop individuals, teams and organisations; promote understanding of the health and social care system; and bring people together to learn, share knowledge and debate. Our vision is that the best possible care is available to all.

What's the toolkit for?

The toolkit is designed to do one thing.

It's designed to encourage you to sit down as a team and think about the way you work together across professional boundaries. The toolkit provides you with a practical step-by-step guide to reflexivity.

Most teams in the NHS - at all levels - do not take the time to stop and reflect. It's seen as a luxury. We're saying it's not a luxury. It's an essential, basic requirement of well-functioning teams – especially when members come from very different professional backgrounds.

'While some doubt the wisdom of taking time out from a team's busy work to conduct such reviews, there is strong evidence that teams which do this are far more effective than those which do not.' Michael West 2012.

It may not sound ground-breaking. It may not sound like you need a toolkit to help you do it. But the reality is that taking the time to stop and reflect on the way you work as a team is a powerful tool for improvement. The best teams do it all the time.

Has it been piloted?

Twenty four NHS organisations took part in the pilot which ran from July-October 2015. The Chartered Institute of Public Finance and Accountancy (CIPFA) interviewed 17 organisations as part of an independent review of the toolkit. This version of the toolkit has been revised to take into account their recommendations.

CIPFA (2015) concluded that: ‘overall, the pilot was universally seen as a very beneficial exercise, regardless of the level of collaboration in place. Many respondents were pleased with how the toolkit helped teams reflect on collaborative working in an open, honest forum.’

Support and advice on offer

The pilots have committed to sharing their experiences within and across the NHS. Many have already presented their experiences to various forums. All the pilots have agreed for their contact information to be made available to any new organisation wanting to use the toolkit.

‘Apart from everything else, I think it’s a very good way of trying to get clinical staff and finance staff working closer together. We have found that to be incredibly positive, so many things have moved forward because of that partnership, which I think wasn’t the case before.’ Pilot site, CIPFA 2015

How do I use this toolkit?

This toolkit forms part of a suite of materials developed by Future-Focused Finance. All the resources are designed to help finance and clinical staff think about how well they work together and find ways to collaborate better.

Section A

sets out why you should take the time to focus on cross-team collaborations (use this to get buy-in within your organisation).

Section B

sets out the process for clinical and financial leads. It provides a framework for having conversations about how well you work together and collecting examples of good practice.

Section C

contains all the tools and templates you'll need to get going – including a self-assessment quiz, e-invites and card games.

There's also a **research summary slide pack**. This sets out the conceptual framework and the factors needed for successful teamwork across functions.