We've given you a framework that clinical and financial leads can use to find out what staff think about the way they work together and what can be done to improve joint working.

'Some people do like to be told step by step. It will very much depend on who works with it. I think largely people like the flexibility to adapt what works for them, and I think that's an advantage of this toolkit.'

Section B

Use our toolkit and strengthen joint working between clinical and finance teams.
A structured conversation

To be successful, you will want to set up a process where people feel safe enough to speak up and to trust each other enough to challenge them. Team reflexivity is a powerful tool, and one that can be used for improvement. However, without skilled facilitation it has the potential to damage relationships.

There are lots of ways to set up a reflexive discussion. We have provided one framework for having these conversations with your colleagues. This is set out in the following step-by-step guide, along with supporting materials. It draws on the seven factors we have identified as critical for successful collaborations across professional groups.

‘Some people do like to be told step by step. It will very much depend on who works with it. I think largely people like the flexibility to adapt what works for them, and I think that’s an advantage of this [toolkit].’

‘I found the toolkit very useful. Having the sample invitation for example, made life a little bit easier and speeded the process up. You could take what you needed from those without having to rethink it all.’

Pilot sites, CIPFA 2015
A clinician and a finance professional agree they want to improve the way their teams work together.

**Identify peer reviewers**
- use the Future-Focused Finance network

**Invite team members and ask them to complete the self-assessment quiz**

**Team session 1 focuses on the seven factors for effective collaboration**

**Peer reviewers write their report**

**Team session 2**
- Peer reviewers present their findings. Staff have an opportunity to reflect, ask questions and agree an action plan

**Teams make the identified changes and review again in six months**

Staff support their peers by sharing good practice and offering to be a peer reviewer for other organisations.
A seven step guide to getting your team of finance and clinical staff to stop and reflect

1. Get the right support
a. **Find a finance/clinical colleague to champion this project with you** (someone from finance if you’re a clinician and vice versa). It will need both of you to work together.

b. **Secure senior commitment for the process.**
   - Make sure your finance director and medical/nursing directors understand that this will need dedicated time (approximately 2 days of your time and some of theirs) and that you’ll be inviting in external peer reviewers.
   - Get the Board/Audit Committee to back you before you start. Ask your Directors to secure the Board’s support for taking this forward and committing to work with you to improve team effectiveness. Cross-team collaboration across professional boundaries isn’t a project. It’s about changing culture, perceptions, values and goals. It needs organisational support to sustain it.

c. **Find peer reviewers through the Future-Focused Finance network**
   - These people aren’t coming to ‘inspect you’. They are there as a critical friend and to support you to have the honest and open conversations that you might not otherwise have.
   - Identify someone that has influence within the organisation, who works regularly with finance and clinical staff and can help establish or improve divisional links.
   - Consider recruiting two peer reviewers - one finance and one clinical – or someone from an organisation that has a similar structure or issues.
   - There is potential for conflict when two different professional groups are brought together to discuss joint working. Make sure you use someone who is skilled in facilitation (and preferably has experience of team interventions and knows about team processes) to host the discussion between your teams. You want colleagues to leave the session excited about better teamwork.
   - Make sure you identify in advance a qualified professional who can offer support to you and the group if discussions don’t go to plan (see section C).
Tips from the pilots

‘Don’t underestimate the amount of selling you’ve got to do for this. You have to be a sort of salesman, which can be a bit tricky sometimes for a traditional finance person.’

‘What I should have done is target somebody who has influence... somebody who works day in, day out with clinicians and nurses. I think that would be a useful way in.’

Most pilots sites used an external peer to support them through the process, although some chose to use an internal colleague.

‘The peer reviewer was very good at taking a step back and making sure that everybody was involved in the meeting session. We found it very beneficial. It’s good to get external feedback as well.

“We moved away from the external and went internal for somebody who was very happy to do it and has facilitated sessions like that in the past. That worked particularly well.

‘The peer reviewer was very important because they drove the meeting forwards and stopped us getting into too much detail and they wrote a fantastic report and the end of it all summarising it’.

‘I would probably recommend an external reviewer for groups where they were building trust or building their relationships from scratch.’
2. Invite the right people
a. Together with the peer reviewers, identify up to three areas of activity where clinical and finance staff have had to work together to improve services.

  • Look for staff who have worked together on service development, business cases, workforce development or transformation projects.

  • Whatever the area, all invited participants should be able to say that they “needed to work with finance/clinical staff to get the job done”.

a. Try to get a range of staff along – not just the most senior members. If you can only identify senior staff, ask them to bring a buddy – someone with a non-management role and interested in improving patient care. We are keen that cross-team working is encouraged and promoted throughout the organisation, not just at a senior level.

b. Let the relevant managers know about the session, why you’re holding it and why the participation of their team members is crucial.

c. Check access requirements.
Tips from the pilots

Securing time commitment, particularly from senior staff is difficult. Pilot sites suggested planning meeting dates and agendas as early as possible and using all routes to promote the toolkit such as booking systems, forums and regular communications that already exist.

‘By far the greatest challenge was organising meeting dates for all relevant staff to attend – finance and clinical staff often have conflicting schedules.’

‘We struggled a bit with clinical engagement – not because clinicians weren’t committed to the process, but just the nature of having to plan at least six weeks in advance to get into their diaries. The clinicians who did come along were invaluable.’

‘Plan both workshop dates in advance so that the same group can confirm their attendance for both sessions.’

‘Build the pilot into the agendas of existing meetings as opposed to creating new meetings altogether.’

‘So much has come out, even just trying to organise it I’ve learnt so much because of trying to get hold of people. I probably wouldn’t have spoken to these people if we hadn’t done this pilot and how long would that be going on for? To be honest, I can’t praise it enough.’

Capture the correct audience. Some of the pilots found they were having discussions with staff that were already engaged and not really increasing collaboration. Make sure your discussion groups contain a balance of finance of clinical staff, and also a balance of divisions.
3. Find out what people think
a. Ask all participants to complete the self-assessment questionnaire. Include a link in the email invitation. This self-assessment acts as a diagnostic tool for effective cross-team collaboration. Its results will help you focus on the issues that the team identifies as most relevant.

b. Be persistent – chase people for their responses. It is important that you have as complete a picture as possible.

a. Discuss the findings with your co-champion and peer reviewers.
   • Agree which key dimensions of effective teamwork appear to be the weakest and need the most attention.
   • Identify where the teams appear to be strongest. Make sure you spend time exploring why partnerships appear to be working well (we want to capture and share examples of good practice and great ideas).
4. Prepare for the session
a. Reflecting on how well a team works, how well it communicates and what could be improved is a skill, and one that might improve with preparation and practice. We recommend that you prepare in advance a number of issues (templates for you to adapt can be found in section C). We recommend that with your peer reviewers, you:

- Agree roles
- Agree the agenda for the session
- Define your objectives for the session
- Agree how and when they will share the findings with the group.
- Decide how/if you plan to split the groups
- Agree a process for collecting examples of good practice
- Come up with some potential next steps for the team.

b. It may feel like a lot of work for one discussion, but you’re bringing people together who might hold very different views about each other and have limited understanding of each other’s roles. Also, despite the evidence that teams are more effective when they take the time to stop and reflect, most don’t manage to find a way to do it.

‘What was really nice as well was clinicians were going away saying “that was really enjoyable this morning. It’s been very well facilitated, we’ve enjoyed every bit of the discussions at the table”.’ Pilot, CIPFA 2015.
5. Get people talking
a. Use the results of the questionnaires to identify key themes for discussion and reflection. Staff will be interested in the scores and how they might compare against others.

a. Think about using the two creative card exercises. They are designed to encourage reflexivity and engage the whole team in debate and discussion.
   • Depending on who is in your group (and its size, the number of staff from each function, and how strong relationships are) you may want to consider splitting into smaller groups by team or by profession. This may help generate discussion and debate.
   • You might want to practice using open-ended questions (see prompts in the resources section).

a. Collect examples of good practice – even if they might seem obvious to you. The peer reviewers will want to share this information with the wider Future-Focused Finance network.

b. Identify your next steps and agree as a team what you could do to improve joint working.

a. Decide when to hold the second team session. Make sure that all participants understand that this is where you will work through the detailed practical steps that are needed to bring about change.
Tips from the pilots

Many organisations chose to adapt the toolkit to their specific needs.

‘The cards were very good for starting conversations. Sometimes finance is a bit of a dull subject, but those cards were useful because they got everyone to think about the different situations that we are often forced into either by finance or by a clinical lead, and how we sort those things out. There were also great at promoting some of the solutions as well.’

‘To be honest with you the cards went out of the window [after the first one]. It was just a good hour and half discussion on what we’re doing, what the challenges are, how we can improve it. It was very organic and just developed.’

‘It was so engaged, we could barely get through one slide without them saying, “can I ask a question?” When people are challenging and asking questions, they’re listening to you; they’re taking an interest. So I’m felling really positive about it.’

There was quite a difference between the clinicians’ point of view and the finance point of view [from the survey]. We thought a good place to start would be to talk about why there such a difference.’

‘The facilitated session was a real opportunity for the team to reflect, and was identified as something that they do not get the chance to do very often (if at all) and that it was a very positive experience. There appear to be limited opportunities to reflect on work – sometimes it seems to be about ‘getting through’ rather than ‘learning from’ because of competing commitments and demands on all people in the group.’
6. Keep going, make changes and reflect again
a. Hold a second team session. The peer reviewers share their findings and reflections.

a. Staff have an opportunity to reflect, ask questions and challenge any of the scores given.

a. Staff agree an action plan for the areas that have been identified as priorities. When agreeing actions from the workshops, think about whether both a member of the clinical and finance staff can be assigned responsibility.

a. If agreed, finance and clinical champions schedule quarterly review sessions with the peer reviewers.

a. Don’t forget to:
   • reflect on the process with your fellow finance/clinical champion.
   • repeat. As a minimum, in complex decision-making teams, reviews should take place at least every six months where the team discusses successes over the previous period, difficulties encountered, and team failures.
   • share the key themes with Medical/Nursing/Finance Directors and agree how to feedback to the Board/Audit Committee.
Feedback from the pilots

‘The pilot made us reflect on some of the things that we used to do which actually work really well, like joint formal meetings led by finance with the clinicians. Some of these ideas, as a result of the pilot, we’re going to relook at.’

‘The biggest improvement so far is probably the morale. I think it was good having everyone in the room and it’s just that thing isn’t it, wanting to hear people’s views and feedback and reflections.’

‘Something that was picked up in both workshops is that we don’t share best practice across divisions and it was something they were all really keen on picking up and doing, going forward.’

‘We tend to meet when we need to for a specific outcome, for example the cost improvement programme to reduce costs in the Trust, but we weren’t really meeting to say. “do we actually function as a team.”’

It came up in discussion several times about not knowing when finance should be included so I think that the people who attended now are a lot more aware of when they should involve finance.

The real value in it is actually showing people the value of having a forum for doing this. I think people’s keenness to take part was due to the fact that they don’t get the chance to have their say in that sort of forum. I think if there was one thing to take away from the pilot, although there will be absolutely loads, the key think is that we keep it going.’

“Because we now understand each other better, I was able to work with my finance colleagues to justify the investment in some equipment which considerably improved the patient experience and shortened their length of stay.”

Expelling the myths, spending time in discussion without an agenda led to a better understanding of the common misconceptions held by the respective teams. This, without doubt, removed traditional barriers of suspicion and allowed a more frank and productive conversation to take place.’
7. Support your peers
a. **Share your good ideas**

Working across professional boundaries is challenging. Don’t keep your successes to yourself. Please share your experiences. Future-Focused Finance is collecting examples of how finance and clinical teams are collaborating. Take a look at other people’s and share yours.

a. **Offer to support colleagues in another NHS organisation**

Share your experience with colleagues in another NHS organisation (maybe one you already have connections with, or one you want to build better relationships with). Offer to support them to take time to meet as a team and discuss how well their finance and clinical staff work together.

Peer review is already used and valued by both professional groups but rarely applied to review joint working between clinicians and finance staff. The Academy of Medical Royal Colleges and the NHS Confederation(2014) offer strong support for the use peer review to promote better decision-making around both cost and quality. They conclude in their recent review, Decisions of Value, that there seems ‘to be a real need to bring likeminded professionals together to share expertise and experience on balancing quality and finance’.
Having an external colleague present for the reflexive session:

- makes it harder for a team to break a commitment to find the time to reflect
- provides access to colleagues’ expertise and experience
- provides the opportunity for fresh perspectives, focused on the bigger picture, and possibly a less-emotionally charged atmosphere
- can help manage conflict and disputes
- allows you to share good practice and strengthen the collaborative learning community of Future-Focused Finance.

Having an external colleague to discuss and follow-up progress with:

- makes it more likely identified actions will take place
- provides a sounding board to discuss challenges and possible routes to overcome them
- allows you the space and time to focus on ‘what next?’ for collaborative working in your organisation.
A quick overview of the process

A clinician and a finance professional agree they want to improve the way their teams work together

Identify external peer reviewers through the Future-Focused Finance network

Invite team members and ask them to complete questionnaires

Team session 1 focuses on the seven factors for effective collaboration

Peer reviewers write their report

Team session 2
Peer reviewers present their findings. Staff have an opportunity to reflect, ask questions and agree an action plan

Teams make the identified changes and review again in six months

Staff support their peers by sharing good practice and offering to be a peer reviewer for other organisations