

# ACCESS ACCOUNTANCY

WORKING TOWARDS EVERYONE HAVING AN EQUAL CHANCE OF ACCESSING, AND PROGRESSING WITHIN, THE ACCOUNTANCY PROFESSION.



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## WHAT IS ACCESS ACCOUNTANCY?

Access Accountancy was founded by and for the accountancy profession, to realise a more representative workforce by socio-economic background. The mission is to ensure that everyone has an equal chance of accessing, and progressing within, the accountancy the accountancy profession based on merit, not background.

The programme was established in 2014 with the ambition to promote diversity across all levels of the sector in the face of overwhelming evidence showing that applicants from lower socio-economic backgrounds are less likely to be hired.

Organisations that sign up to Access Accountancy commit to measurable outcomes, which aim to deliver real change and welcome talented young people from all backgrounds, supporting social mobility.

## THE COMMITMENT

Once signed up to Access Accountancy there are a number of [milestones](#) organisations are expected to work towards. These milestones are really important as they will help to increase the volume, scope and quality of activity to improve access to, and progression within, the accountancy profession for young people from less advantaged backgrounds across the UK.

There is also a commitment to an annual donation. This will be dependent on the number of accountants employed if a business, firm or other organisation, or number of members if a professional body. For the NHS in England, the East of England Finance Academy have covered the donation until August 2026 meaning that any organisation in England can take part.

Work Experience is a part of Access Accountancy where those signed up can offer exciting placements for young people from low socio-economic backgrounds, in order to give them a good insight into accountancy as a profession. The placements are aimed to give young people the opportunity to experience an office environment, work place culture and develop skills. Opportunities they may not otherwise get.



# THE BENEFITS OF JOINING THE PROGRAMME

Improving socio-economic inclusion for access into the accountancy sector will mean organisations will provide opportunities to recruit, promote and retain some of the most under-represented talent in the country; helping to make the sector more diverse, socially representative and productive.

If we want to improve diversity in NHS finance and truly represent the populations we serve it is really important that we give everyone no matter their background the opportunity to access our finance departments.

# ACCESS ACCOUNTANCY IN THE NHS IN THE EAST OF ENGLAND

Lore Lippmann, Deputy Director of Finance, The Queen Elizabeth Hospital King's Lynn NHS Foundation Trust has led on Access Accountancy in the region and explains how she found out about the programme and has driven its success in the East of England.

*"When I attended the HFMA conference in 2019, I was particularly struck by the opening presentation from Karen Blackett OBE who introduced her audience to a book written by June Sarpong, called 'Diversify'. It is a great read and contains a wealth of practical suggestions on how to diversify our workplaces and makes brief mention of the 'Access Accountancy' programme. After some initial research, I learned that the programme is hosted by the Institute of Chartered Accountants in England and Wales (ICAEW), of which I am also a member. I decided to introduce Access Accountancy to the NHS finance function. All great journeys start with a small initial step, and I am happy to say that with support from NHS England regional team, the entire NHS finance function in the East of England was signed up during 2021. At the Queen Elizabeth Hospital in King's Lynn, we were able to offer the first week of*

*Access Accountancy in October 2021, with the support of several other NHS organisations, including the finance team of the Norfolk and Norwich University Hospitals NHS Foundation Trust, who ran the same week in tandem with us. Since 2021, I have been working with colleagues in Norfolk and Waveney ICS, and in the wider East of England region, to continue to offer Access Accountancy work experience with a growing range of participating NHS organisations. I think that Access Accountancy is an important initiative as it supports social mobility. It is also a way for our finance teams to directly support what it means to be working in anchor institutions which have an important role to play in the communities we serve. Finally, it helps us showcase what a diverse range of roles we have in NHS finance, and to provide an initial entry point for a more diverse pipeline of future accountants working for the NHS."*



# WORK EXPERIENCE

Organisations such as The Queen Elizabeth Hospital King's Lynn NHS Foundation Trust and Norfolk and Norwich University Hospitals NHS FT have partnered with local schools to run work experience weeks.

Work experience as part of Access Accountancy is for students that:

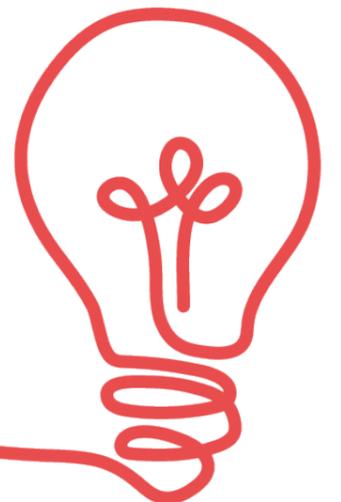
- Attend a state school or college and;
- Are in year 10, 11, 12 or 13 (the exact year required will depend on the firm) and;
- The occupation of their main household earner when they were aged 14 is categorised as a lower socio-economic background or;
- Are/have been eligible for free school meals or;
- Attend a school that is above the regional average in terms of the number of students eligible for free school meals or;
- Would be the first member of their immediate family to attend university.

Access Accountancy does not set academic entry requirements, it is up to individual organisations if they wish to do this. If organisations want to set entry requirements, make sure these are not a barrier to potential talent. If organisations don't have existing contacts with schools, Access Accountancy recommend that you start by selecting 1-2 schools near your local office and researching their social mobility stats to assess suitability (which usually can be found on the schools website or OFSTED report). Selecting students for Access Accountancy is not about selecting students who would be suitable for your permanent roles – it is about assessing motivation and potential.

*"My role with the Regional Finance Team enables me to see lots of the fantastic EDI work taking place in the East. I have not witnessed anything that exceeds Access Accountancy's capacity to offer a way to quickly transform the life trajectory for candidates and their families. That we simultaneously get to improve our services via improved representation makes it an easy decision for the Region to fully support this fantastic scheme."*

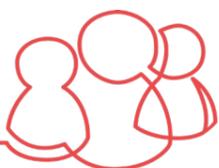
*"I would encourage any candidates thinking of applying – please be brave and take the chance to find out more. For organisations the barriers to taking part are minimal with an immediate payoff and a real chance to diversify your recruitment pipeline."*

Jason Donovan – Head of Finance, Assurance, NHS East of England.



# WHERE TO START WHEN SETTING UP WORK EXPERIENCE IN YOUR ORGANISATION

1. Plan the number of placements and locations.
2. Find out if there are any colleagues who have contacts at the local schools. If not do some research into your local schools or use the Sutton Trust list to select target schools. Access Accountancy may also be able to help (via the ICAEW's Head of Access and Volunteer Programmes). There are also the students that have opted in to hearing from AA signatories. If you are a signatory you will have access to this. The One NHS Finance team might also have contacts through the outreach work for the Insights Placement Scheme.
3. Create job description for programme (Access Accountancy have templates to help with this).
4. Confirm your selection process.
5. Reach out to schools. You can also use advertising suppliers to promote your roles online i.e. RateMyApprenticeship, AllAboutSchoolLeavers, Milkround, TargetCareers etc.
6. Also promote on social media platforms and attend school fairs where possible.
7. Ensure that candidates are able to disclose any reasonable adjustments needed in the selection process/ work place.
8. Make sure you leave a positive candidate experience through the selection process:
  - a. Provide valuable feedback to all candidates.
  - b. Provide resources to support candidates through the selection process e.g. interview tips
  - c. Offer alternative job boards/ insight experiences for unsuccessful candidates.
9. Carefully plan out the week of work experience beforehand and agree a final timetable of activities to ensure that it is both varied and challenging for students.
10. You will need to collect certain data from the students in order to feed this into the Access Accountancy data collection process each year.



## ONBOARDING STUDENTS

There are many things to think about when onboarding the students for their work experience:

- Make sure you have communicated the dress code.
- Are you reimbursing them for lunch and travel expenses? Is there somewhere to get lunch onsite? (note- one condition of the programme is that students' get lunch and travel expenses- at the QEH, they use volunteer vouchers so these can cover the lunch. They also offer free parking to anyone on work experience).
- What is the best way to communicate with them? Is it text instead of email?
- Right to work checks.
- Induction - this is particularly important as first impressions are often lasting.
- Ensure a buddy or coordinator is in place who will be the main point of contact for the week and can also coach the student throughout the week. Ideally the buddy would be a junior member of the team who contacts each student ahead of the start of their week- this has proven successful in other public sector organisations, such as the NAO.
- Signing contracts – do they need to do the full normal offer pack? (at the QEH, they use a work experience agreement, which may need to be signed by the student's parent or guardian, depending on the student's age).
- Training (safeguarding, working with young people) for staff- this should be covered by mandatory training for all staff anyway.
- Site show around (toilets etc).
- Laptop set up if you are providing the candidates a laptop for the week, this is not compulsory.

# HOW THE FINANCE DEPARTMENTS AND STUDENTS FOUND THE WORK EXPERIENCE WEEKS

## QUEEN ELIZABETH HOSPITAL KING'S LYNN NHS FOUNDATION TRUST

*"Offering Access Accountancy work experience has been a win-win development and learning opportunity for our finance team and the students. Many members of the finance team have, through engagement with the students, felt re-affirmed in the importance and varied nature of their own role(s) and able to take renewed pride in their work. Final student presentations, reflecting on their week at our Trust, have conveyed real enthusiasm for seeing finance serve patient care by helping run a hospital like ours."*

## NORFOLK AND NORWICH UNIVERSITY HOSPITALS NHS FOUNDATION TRUST

*"The Norfolk and Norwich University Hospitals ran our first Access Accountancy work experience programme in October 2021, giving an opportunity to a couple of students to understand more about Accountancy, and the possibilities of working in NHS Finance teams. The students output demonstrated the breadth of content they had learnt about NHS Finance in just a weeks' work experience and the possibilities of a career both in accountancy and within the NHS. We are looking forward to running the programme again this academic year and making NHS Finance a visible career option to our next generation of budding accountants."*

## NORTH WEST ANGLIA NHS FOUNDATION TRUST

*"The key points are to work with the Widening Engagement /Increasing participation team who often deal with apprentices in the organisation and more often than not sit within the Human Resource function. They understand the rules around having minors in the workplace and crucially have the links with the schools, and by that I mean they regularly have contact with the careers counsellors in those schools. The schools are not passive in all this, and they need to be worked with to ensure that they understand what access accountancy can provide and crucially who would benefit. So, the schools should have real agency in encouraging pupils to apply. Our experience is that students who do attend are surprised at the number of roles that exist within a NHS finance department, including learning that within a finance function there are lots of staff who are not accountants but who are still part of the team. The finance function offers a diverse range of careers."*

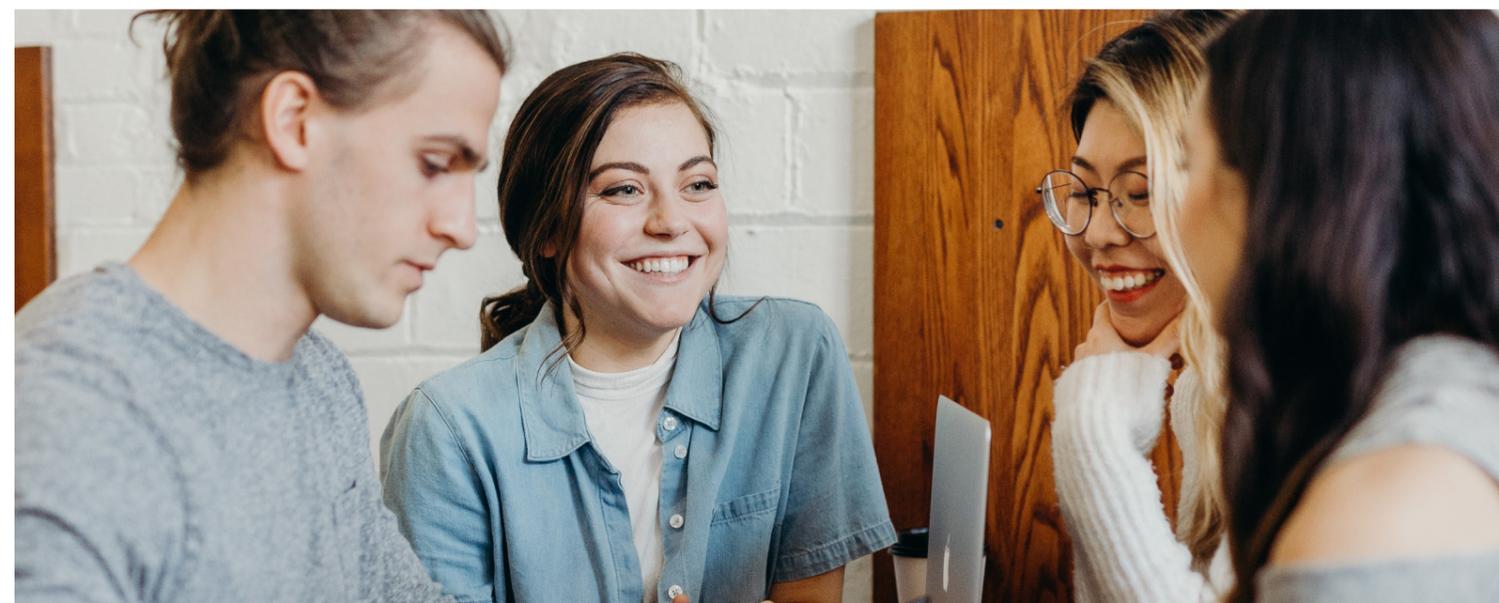
## WHAT THE STUDENTS THOUGHT ABOUT THEIR WORK EXPERIENCE AT QUEEN ELIZABETH HOSPITAL KING'S LYNN NHS FOUNDATION TRUST

*"When I first heard about the NHS I would always think about healthcare, doctors and nurses. However, through this experience I also learnt the importance of having a strong Financial Department in order to deliver the best possible healthcare services. By speaking with multiple staff members I also saw their passion in wanting to help the healthcare workers by providing the appropriate financial support. The thing I loved the most about this work experience was being able to visit different areas within the finance department that I would not have been aware of otherwise and speaking to the different individuals to gain greater insight. I would definitely recommend it to other students, especially those who are unsure of what they would like to do in the future as this experience has really helped me explore the multitude of finance jobs available whilst also being able to gain insightful advice from staff. Being in the NHS is definitely a possible career path for me in the future, as having experienced working within the organisation, I was able to gain an insight into how rewarding the job and how everyone in the Financial Department work together in order to support the organisation in delivering the best care."*

Alisha from Springwood School.

*"The NHS access to accountancy programme was a fantastic opportunity in providing a comprehensive insight into the department of finance. Being within the NHS allowed me to realise that the corporate objectives differ from the ones set by other firms. I thoroughly enjoyed exploring the broad scope of finance e.g. procurement, payroll, investments etc. Most significantly, the whole experience allowed me to consider whether a career within the NHS is likely because of the rewarding aspect of being within the hospital environment. Staff are extremely friendly and accommodating and are always eager to answer any questions. I would most definitely recommend the programme to the students, whether considering a career within the NHS or not, the insight into the field of work is an invaluable experience that should not be disregarded."*

Tracy from Springwood School.



# WORK EXPERIENCE EXAMPLE ITINERARIES

Access Accountancy provides a useful toolkit for those wishing to put on work experience as part of the programme. QEH and NNUH have shared their sample timetables that they have used for their for their work experience weeks, which you can see below. You could also think about setting up work experience across your system. This would minimise the amount of time staff need to dedicate, whilst ensuring a dedicated learning experience across different NHS settings.



<b>Department: Finance – at the QEH</b>	<b>Placement Student: xx/xx</b>	<b>Week commencing: 25th October 2021</b>
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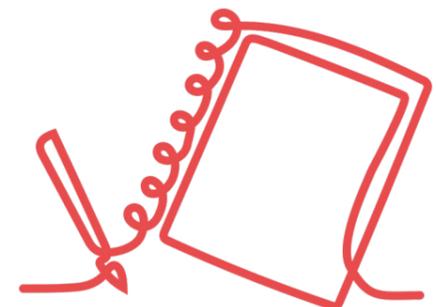
Day	Monday	Tuesday	Wednesday	Thursday	Friday
<b>Start time and location</b>	9am, Widening Engagement lead office	9am Trust finance team offices-walk over to procurement	9am Trust finance team offices-walk over to Estates	9am Trust finance team office	9am Trust finance team offices-walk over to BHT offices
<b>Morning activity and location</b>	1) Welcome to Trust- Widening engagement lead 2) Meet Buddy in finance- watch the funding flows video 3) meet DDoF	Morning in procurement	Morning in Estates	Intergrated Care Board talk- MS Teams	Meeting Better Hospitals Team (1hour) Reflecting on week-writing short presentation
<b>Supervisor</b>	xxx	xxx	xxx	xxx	xxx
<b>Lunch start and finish times</b>	One hour between 12 and 2pm	One hour between 12 and 2pm	One hour between 12 and 2pm	One hour between 12 and 2pm	One hour between 12 and 2pm
<b>Afternoon activity and location</b>	Meet Trust payroll team, speak to apprentice (past or current). Meeting Financial Management team-plus cash run in Financial Services	NHS England talk- MS Teams	Financial Services, Treasury, Charitable Fund (with Charitable Funds Accountant), overview of capital (with capital team)	Attending study support group meeting (shadow). Meeting income, costing, contracts team	Work on final presentation; final presentation, close
<b>Supervisor</b>	xxx	xxx	xxx	xxx	xxx
<b>Start time and finish time</b>	9.00 am to 4pm	9.00 am to 4pm	9.00 am to 4pm	9.00 am to 4pm	9.00 am to 4pm



<b>Department: Finance – at Rouen Road</b>	<b>Placement Student: xx/xx</b>	<b>Week commencing: 25th October 2021</b>
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Day	Monday	Tuesday	Wednesday	Thursday	Friday
<b>Start time and location</b>	9am, 6th Floor, 20 Rouen Road	9am, 6th Floor, 20 Rouen Road	9am, 6th Floor, 20 Rouen Road	9am, 6th Floor, 20 Rouen Road	9am, 6th Floor, 20 Rouen Road
<b>Morning activity and location</b>	Induction, overview and fire/health and safety. Expectations of the placement (XXXXX)	Staffing costs, recording, reporting and monitoring  10-11am A&E Budget Meeting (XXXXX)	Analysing financial data:  -Budget reports -Staffing costs -Agency costs -Issues and trends (XXXXX)	Intergrated Care Board talk- MS Teams	Meeting Better Hospitals Team (1hour) Reflecting on week-writing short presentation
<b>Supervisor</b>	xxx	xxx	xxx	xxx	xxx
<b>Lunch start and finish times</b>	Half hour between 12 and 2pm	Half hour between 12 and 2pm	Half hour between 12 and 2pm	Half hour between 12 and 2pm	Half hour between 12 and 2pm
<b>Afternoon activity and location</b>	Standing Financial Instructions – preparation of training presentation for budget holders (for completion by Friday)	Understanding budgets, how they are set and relationship to expenditure. Budget statement familiarisation. (XXXXX)	- Introduction to costing medical and nurse staffing - Journals & the ledger - NHSP agency/ bank staff data (XXXXX)	Formulating a budget holder action plan to control expenditure (using work done from Wednesday morning). (XXXXX)	Budget holder meetings – Urgent Care 2-3PM  Debrief and evaluation (XXXXX)
<b>Supervisor</b>	xxx	xxx	xxx	xxx	xxx
<b>Start time and finish time</b>	9.00 am to 4pm	9.00 am to 4pm	9.00 am to 4pm	9.00 am to 4pm	9.00 am to 4pm

Please note that your timetable may be subject to change during the Work Experience Placement week. Your supervisor will notify you of any changes.



# OTHER IDEAS FOR WORK EXPERIENCE

## Day 1

1. Initial meet with Placement Mentor.
2. Ensure students have all that they need for the week. If the work experience is being conducted face to face, don't forget to give students a site tour and any necessary housekeeping.
3. Explain what is planned for the week ahead in terms of meetings and activities.
4. Introduce students to team.
5. Local team structure – Explain to students how the team is structured.
6. Organisation structure – Explain to students how the organisations is structured and what the organisation does.
7. Show students how the organisation links into the Integrated Care Systems and local Health Community.

Useful resources for day 1:

### Introduction to NHS and NHS Finance

1. [How the NHS is Structured](#)
2. [The Values of the NHS Constitution](#)
3. [Take a NHS Careers Quiz](#)

### NHS Finance:

1. [NHS Finance Explained-The Structure of the NHS and how the Money Flows](#)
2. [What Could a Career in NHS Finance Offer You?](#)
3. <https://financecareers.nhs.uk/>

## Day 2 and 3

### Different Roles Within NHS Finance

[Finance Roles](#) introduction to the different roles in the different NHS organisations. Dependent upon availability of contacts, you could plan in some meetings for Day 2.

Calls/ Meetings with the following:

- With the Chief Financial Officer
- Integrated Care Board/Intergrated Care System Finance – Financial Accounts, Management Accounts and Contracting
- Provider Finance – Financial Accounts, Charitable Funds (probably acute), Financial Systems, Accounts Payable and Receivable, Patient Accounts, Management Accounts, Costing, Income, Capital Accounts, Payroll
- NHS England – Financial Reporting and Regulation

Cover as many as possible within the host organisation and then use links within the ICS to cover any other areas.

Reading Material:

- [NHS Finance Careers – School Leaver](#)
- [NHS Finance Careers – Undergraduate Placement/ College Leaver](#)
- [Exploring the Role of the NHS Finance Business Partner](#)
- [Finance Career Stories](#)
- [The Role of the NHS Finance Chief Finance Officer](#)



## Day 4

### Employability

- Provide a Job Description and Person Spec for a role in the team at the appropriate entry level (Apprentice, rotational post etc)
- Student to fill out a personal statement that they would use to apply for that post.
- Placement mentor to review and provide feedback.

### Opportunities:

- Link to [AAT](#)
- Meeting with an Apprentice in the health community
- Virtual Meeting with those currently studying AAT in the patch

### Project:

- Think about what your ideal role may be and fill in the template Job Description and Person Spec detailing the roles and responsibilities of the post, and then what you would need to apply for the post.
- Compare this with what skills and qualifications you currently have – what are the gaps?
- What can you do between now and applying for a job to fill some of those gaps?

## Day 5

### Project:

- Complete Project set on Day 4
- Present back to your Placement Mentor and include any reflections of the week with NHS Finance

# HOW TO GET INVOLVED

If you would be interested in the programme please email [one.finance@nhs.net](mailto:one.finance@nhs.net)



### FURTHER INFORMATION

You can find further information on our website:

[www.onenhsfinance.nhs.uk](http://www.onenhsfinance.nhs.uk)

Or contact us at [one.finance@nhs.net](mailto:one.finance@nhs.net)



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.



Future-Focused Finance (FFF) is a national programme designed to support our staff by engaging everyone in improving NHS finance. We want to bring finance staff at all levels of the profession together to build a community and platform where everyone feels valued and has a voice to support the delivery of quality services for patients. The programme will facilitate opportunities for finance staff to network, collaborate and share learning and good ideas, alongside working with clinical and other non-finance colleagues. As part of its overall aim FFF, and its networks, will identify new ways to promote NHS finance as a career choice and support our staff to make NHS finance the best place to work.