

NHS FINANCE INSIGHTS PLACEMENT SCHEME

SOUTH WEST CASE STUDIES 2025-26



INTRODUCTION

The NHS Finance Insights Placement Scheme began as a pilot programme in London in 2023. Designed to open up routes into NHS finance, the scheme offers a 12-month placement in an entry-level Band 2 finance role, giving trainees the opportunity to build confidence, develop practical skills and gain valuable on-the-job experience in a supportive NHS environment. Following the success of the pilot, the South West was keen to bring the scheme to the region and create new opportunities for people to explore a career in NHS finance.

It quickly became clear that the geography and transport links across the South West would present challenges for a region-wide trial, so Bristol was identified as the ideal place to establish the scheme and build momentum. In September 2024, four trainees joined the first South West cohort. We are incredibly proud that all four graduated in September 2025 and have since moved into full-time employment.

While the first trainees were in post, we continued to promote the scheme across the South West, raising awareness and encouraging more organisations to get involved. In September 2025, three new trainees began placements with University Hospitals Bristol and Weston NHS Foundation Trust, Avon and Wiltshire Mental Health Partnership NHS Trust, and Cornwall Partnership NHS Foundation Trust. This document brings together their reflections on the NHS Finance Insights Placement Scheme, sharing their experiences, achievements and the impact the placement has had on their career journeys. We are delighted to celebrate that all three trainees from the September 2025 cohort have now secured full-time roles in NHS finance. Their success is a testament to their commitment, the support of their host organisations and the value of creating practical, inclusive pathways into the profession.

We are equally proud to be welcoming four more trainees to the scheme in September 2026, and we will begin recruiting further organisations to take part from September 2027, helping the scheme reach even more people and spread further across the region.



REGIONAL REFLECTION

CHARLEY SPICER, PROGRAMME MANAGER SOUTH WEST FINANCE ACADEMY



Working on the NHS Finance Insights Placement Scheme has been one of the real privileges of my role. From the first conversations about whether we could make the scheme work in the South West, through to supporting organisations to get involved and hearing how trainees have settled into their teams, it has been a genuinely rewarding journey. What has stood out most is how strongly NHS finance colleagues have wanted to make this happen. Even at a time of significant pressure, people have continued to give their time, energy and encouragement because they can see the difference this opportunity can make.

There is talented, capable and ambitious young talent in every part of our region, and we have a responsibility to create routes into NHS finance that feel visible, accessible and achievable. My ambition is that, within the next few years, every ICS across the South West will have hosted at least one trainee and experienced first-hand the value the scheme can bring.

The success of the scheme is down to the people who have championed it. Placement managers, line managers and finance colleagues have welcomed trainees who are often taking their first step into the workplace, supporting them to build

confidence, develop professional skills and begin to see a future for themselves in NHS finance. That commitment should not be underestimated, and I am incredibly grateful to every colleague who has helped make the placements such a positive experience. I would particularly like to thank Claudia Bisetto at Bristol NHS Foundation Trust, whose energy and commitment has helped raise the profile of the scheme locally, including taking the opportunity directly into schools and making NHS finance visible as a career path. I am also grateful to the national One NHS Finance team for their guidance and support as we have developed the approach in the South West.

For me, this scheme is special because it is both practical and personal. It gives young people a paid opportunity to learn, contribute and belong, while helping NHS finance teams think differently about how we attract and grow future talent. These case studies show what is possible when we open a door and surround people with the right support. I hope they encourage more organisations across the South West to get involved, because the impact reaches far beyond a 12-month placement!

CASE STUDY 1

CATHERINE SMITH, INSIGHTS TRAINEE CORNWALL PARTNERSHIP NHS FOUNDATION TRUST

Being in the NHS Finance Insights Placement Scheme has been a highly rewarding experience for me. It has given me the building blocks for a thriving start to my career within the NHS. Through the scheme, I gained hands-on experience, valuable skills, and great relationships with others.

In the beginning, I had a willingness to learn and develop. What I expected at the start was to gain a better understanding of NHS finance and learn more about the different areas within the finance function. I was also hoping to develop my confidence and practical skills in a professional working environment. Over the course of the placement, I had the opportunity to work across a variety of finance areas, including financial accounting, management accounting, and transactional finance activities. In each area, I learned new skills and gained a better understanding of how finance supports the delivery of NHS services. This experience helped me appreciate how the different teams work together to support the organisation's financial objectives.

It has greatly improved my confidence and communication skills, which led to me taking ownership of tasks and working well within a team. I felt fully supported by others within the team with my dyslexia and autism, which now feel far less like obstacles to overcome. I developed strong Excel skills, alongside teamwork, problem-solving, and time-management skills, which contributed to a range of processes within the team and continue to help me in my current Finance Administrator role. These skills, alongside the practical experience and confidence I gained through the scheme, played a key role in helping me secure the position. Another positive aspect for me has been that my attention to detail and problem-solving abilities have improved through my time in the scheme. I now have the confidence to ask more questions and for help, manage my workflow, and ensure tasks are completed thoroughly and on time. It made a real difference to how I work and in my personal life.

The scheme itself is a fantastic opportunity, both for others and for the NHS. It brings fresh perspectives and enthusiasm, while also helping to build the skills and confidence needed for a future career in NHS finance.

Overall, I have really enjoyed being part of the scheme and supporting the placement. It has reinforced how important it is to invest time in developing people early in their careers, and I would highly recommend the scheme to others wanting a career in Finance or the NHS.



IT BRINGS FRESH PERSPECTIVES AND ENTHUSIASM, WHILE ALSO HELPING TO BUILD THE SKILLS AND CONFIDENCE NEEDED FOR A FUTURE CAREER IN NHS FINANCE

CASE STUDY 2

KIAN WILLIAMS, INSIGHTS TRAINEE AVON AND WILTSHIRE MENTAL HEALTH PARTNERSHIP NHS TRUST

The NHS Finance Insights Placement Scheme has truly been an extraordinary opportunity for me. I have not only been able to gain a deeper understanding of the finance world and significant key foundational knowledge across all areas of finance, but I have also been able to grow as an individual, develop greater confidence in everything I do, gain stronger communication skills and, importantly, enhance my critical thinking and problem-solving skills. The scheme has given me the unique opportunity to learn, understand and grow first-hand in multiple different teams over the course of the year, rotating to different areas every few months. This has allowed me to experience a vast variety of different tasks and has made me a more complete and competent individual by placing

me in different scenarios with changing workloads and responsibilities. As a result, I have gained key adaptability skills, as well as a broad understanding of how different areas of finance operate and how they all contribute to the wider organisation. The scheme has been something I am truly proud of and grateful to have experienced, and one which has set me up perfectly for any future endeavours I hope to have in the finance world.

Starting the scheme, I worked in payments and income, where I was responsible for verifying, processing, raising and chasing invoices. I was also able to learn the full process of raising ARRS invoices and sending S12s to payroll.

Mainly, I was able to understand key financial systems, for example Business World and Proactis. Finally, working with these teams allowed me to learn how to use Excel, Word, PDFs and Outlook to write professional, clear and concise emails, all of which are extremely key systems and skills to gain.

Next, I worked in the business planning and development team. Here, I was able to further develop my digital literacy skills in more depth, for example by gaining a deeper understanding of Excel and all its processes, while also learning key shortcuts to increase my efficiency and productivity. I was also able to do a deep investigation into the trust's spend on room hire and other discretionary spend, which enabled me to develop key investigation and analysis skills and aid the trust in identifying potential areas for savings, while also highlighting specific teams where spend may be high so that a solution could be created and pushed forward. Furthermore, I also did key work on specific contracts named electro-convulsive therapy contracts, where I outlined key information such as activity, spend and variations. This aided the team by giving them a clearer understanding of this area in contracts, allowing them to make a more calculated and informed decision on how to move forward. Finally, I was tasked with doing deep internet research on a variety of projects to give my team key information. For example, I researched neighbourhood mental health centres, helped identify potential charities the trust could go to for a therapy pod donation, successful Child and Adolescent Mental Health Services models and much more. All this research developed my PowerPoint skills, allowing me to put together a more professional presentation, while also giving me the opportunity to present my work to

colleagues and grow my presentation skills.

Finally, in my current rotation, I'm currently working three days in procurement and two days in finance. This has once again given me a fresh new insight into an area I wasn't familiar with. Some tasks I've currently done include creating updated contract templates, chasing policies for the team and attending key supplier meetings. Mainly, I'm in charge of creating a central Excel spreadsheet of all the contracts in the trust, allowing the team to access key information such as annual value, costings, who is responsible for the contract and overhead amounts, all in one area.

Overall, the NHS Finance Insights Placement Scheme has truly been a life-changing experience, where I feel I've understood, learnt and grown in a multitude of different ways I would never have expected. The financial knowledge I've acquired has been nothing short of incredible, and I feel like I've been set up for any future career I go on to have. The rotational nature of the scheme, allowing me to work with multiple different teams, has been so valuable in allowing me to develop as a professional who can walk into a multitude of environments and feel confident in having to adapt and learn any new tasks or responsibilities. I couldn't recommend the scheme enough, as it almost guarantees that you come out the other side as a more well-versed and confident individual, with key foundations set for a future career in the financial world and space.



CASE STUDY 3

MAHAMED ABDILAH, INSIGHTS TRAINEE BRISTOL NHS FOUNDATION TRUST

The NHS Insights Placement Scheme has been one of the most valuable experiences in my professional development. When I first joined the scheme, I knew very little about NHS finance and was unsure what to expect. However, the placement gave me the opportunity to learn from a variety of teams, develop new technical skills, and build my confidence in a professional environment. Looking back, the scheme has helped me grow both personally and professionally, and it played a major role in helping me secure my current role as an Assistant Management Accountant (AMA).

My first placement was in Accounts Payable, which I believe was the perfect place to start. The team was welcoming, supportive, and always willing to answer questions. During my time there, I learned the fundamentals of processing invoices, understanding financial controls, and working accurately with large volumes of data. I also developed strong Excel skills, which have been extremely useful throughout my career journey. Accounts Payable gave me a solid foundation in NHS finance and helped me settle into the workplace environment. It was an excellent introduction to how financial processes support the wider organisation.

One of the biggest challenges I faced at the beginning of the placement was adapting to a full-time professional routine. Getting used to being in the office on time every day was a significant adjustment. I also had to develop my confidence when speaking to colleagues and having conversations that I would not normally have. At first, this felt uncomfortable, but over time I became more confident communicating with different teams. These soft skills were just as important as the technical finance skills I gained and helped me become more professional in my day-to-day work.

After Accounts Payable, I spent one day a week working with the Payroll team. This team had a different working style and was generally more relaxed, with fewer strict deadlines compared to Accounts Payable. My experience in Payroll gave me a greater understanding of how much NHS expenditure is related to staff pay. I was involved in making pay changes and helping to ensure employees received the correct salary. This responsibility showed me how important accuracy is within payroll processes, as even small errors could have a direct impact on staff members.

During this period, I also spent one day a week with the Management Accounts team. This was the placement that truly sparked my interest in management accounting. I was able to bring together many of the skills I had developed across the scheme and apply them to more complex financial tasks. I gained experience working on pay adjustments, accruals, and prepayments while developing a better understanding of budgeting and financial reporting. I enjoyed analysing financial information and understanding how management accounts help support decision-making across the organisation.

The experience I gained in Management Accounts gave me the confidence to apply for an Assistant Management Accountant role within Medicine and Weston. I was able to draw on the knowledge, skills, and experiences I had developed throughout the Insights Placement Scheme when preparing for the interview. The interview went very well, and I was delighted when the team told me they wanted me to join them. Receiving that offer was a proud moment and demonstrated how much progress I had made since starting the scheme with very limited knowledge of NHS finance.

IT PROVIDED ME WITH EXPOSURE TO DIFFERENT AREAS OF FINANCE, HELPED ME DEVELOP TECHNICAL AND INTERPERSONAL SKILLS, AND ALLOWED ME TO BUILD CONFIDENCE IN A PROFESSIONAL SETTING.

Overall, the NHS Insights Placement Scheme has been an incredible opportunity. It provided me with exposure to different areas of finance, helped me develop technical and interpersonal skills, and allowed me to build confidence in a professional setting. From learning the basics in Accounts Payable, to understanding the importance of Payroll, and finally discovering my passion for Management Accounts, every stage of the scheme contributed to my development. Most importantly, it helped me secure a role as an Assistant Management Accountant and gave me a strong foundation for my future career within NHS finance.

FURTHER RESOURCES



NHS FINANCE INSIGHTS PLACEMENT SCHEME

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Create, develop and support a leading NHS Finance community for the South West that reflects the population we serve and supports the delivery of the NHS Finance Development Strategy.

If you have any questions on any of the above or would like any further information, then please get in touch with the team at one.finance@nhs.net

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