Background
Like all UK local authorities, Warwickshire County Council (WCC) is facing a number of challenges; there are continuing budgetary pressures, the need to find savings and make efficiencies, while at the same time meeting increasing demands for services.

To help meet these challenges, WCC initiated a major cross-council transformation programme in 2018 and as part of this, set out to ensure that more responsibility could be placed on delivery managers to control budgets and make financial decisions.

Liz Firmstone, Strategic Finance Manager of WCC, explains: “Our new operating model is based around maximising the use of technology, with greater self-service for customers, and more accurate and transparent financial information.

“Key to embedding this model is giving clarity around the respective roles and responsibilities of managers and finance staff, to ensure accountability, and to drive the right behaviours – for realistic budget forecasting, and recognising that public funding is a Council-wide resource, not a personal budget.”

As well as ensuring managers have a clear picture of the wider financial context and challenges facing local authorities, the aim was to foster best practice in budget management, such as accountability, good budget skills, an understanding of terminology, and forecast and monitoring requirements.

WCC’s Finance Training Board decided to partner with a training provider to deliver a development programme to managers. Liz Firmstone explains:

‘WCC was obviously aware of the wide range of services that CIPFA offers, and having reviewed the material available on the website regarding bespoke finance training we decided to enter into a dialogue to see if CIPFA would be able to meet our requirements.’

Liz Firmstone
Strategic Finance Manager,
Warwickshire County Council
**Train for success**

With clear objectives and outcomes in mind, WCC knew that a bespoke training programme would be needed to ensure all its managers were doing the best they could – delivering best practice, value for money and innovation – while enhancing the overall culture within the organisation.

Liz Firmstone explains: “As financial pressures in the public sector continue to bite, the need for managers to use their resources as efficiently and effectively as possible, and to avoid a ‘silo’ approach, has become ever more apparent.”

‘While the vast majority of managers understand their responsibilities well, we are constantly striving to improve our financial management so that we are using our funding as optimally as possible in order to deliver on the authority’s objectives.’

WCC’s new operating model focuses on enhancing managers’ accountability and ownership of financial performance, whilst enabling Finance to support them to achieve this. “We had a number of managers coming into post who were new to financial management,” explains Liz Firmstone. “We also wanted to re-set our finance service offer, roles and responsibilities and financial framework as part of our new finance operating model, and wanted to use this training as a tool for embedding our updated approach.”

As a result, WCC’s brief to CIPFA was “to design a training programme that focused at least as much on the ‘why it is important’ as on the ‘what you need to do and how’.”

**A bespoke solution**

The process to develop the WCC programme began with an in-depth Training Needs Analysis to identify WCC’s specific requirements.

“We had a very early meeting with the key stakeholders at Warwickshire County Council to talk about exactly what was needed,” explains Gareth Batterbee of CIPFA. “There is always a danger that finance training becomes a theoretical knowledge transfer rather than something with firm, practical application. We asked the client what behaviours they were currently seeing from the managers who were good at this as well as those who weren’t. We then asked what needed to change and improve, which gave us clarity about the desired outcomes of the programme.”

CIPFA recommended a money management training course. This incorporated relevant modules from CIPFA’s Finance Business Partnering and Finance for Non-Financial Managers course, tailored to the specific needs of WCC managers. It was designed to include robust case studies and stories coupled with a learning design that would deliver the behavioural change that WCC wanted.

The one-day, face-to-face training session would be delivered on-site in Warwickshire by CIPFA trainers Lisa Forster and Gareth Batterbee, with delegates completing a mandatory WCC e-learning course before attending.

The first ‘Managing Money at Warwickshire’ training programme began in October 2018 and ran till June 2019, with 14 one-day sessions hosting 10 to 15 delegates each session. Further courses have been scheduled to run through to March 2020.

Each training day brings together service managers from different areas across the council, facilitating knowledge and experience-sharing. “The sessions are interactive, with delegates discussing issues and working through specific questions and exercises – with the aim of encouraging thinking outside of their silos,” says Lisa Forster of CIPFA. “We get them to look beyond their service – and to understand the wider picture of how certain external national or even global actions [such as China’s ban on waste imports] can have an impact on their role and WCC’s finances.”

The aim of the training programme is to ensure that all delegates are able to:

- Explain what good financial management means in the context of service delivery for WCC
- Describe their roles and responsibilities as cost centre managers at each stage of the financial cycle
- Define key financial terms and what they mean for cost centre managers
- Apply best practice budgeting and forecasting techniques
- Appreciate the impacts of good and poor financial decisions for service delivery.

The practical element of the programme is also an important focus, explains Gareth Batterbee:

‘We keep the slides to a minimum, instead using exercises to be completed in small groups so that the participants have the opportunity to put the learning into practice immediately.’

To maximise the benefit from this training, WCC’s finance team ensure there is a representative in each session to handle system/process specific questions – and to demonstrate that the team is supportive and engaged. The representative also captures useful feedback on finance system and behavioural issues that the participants encounter, which is fed back to the finance centre for actions.
Delegates' highlights:

‘I liked the way the course concentrated on the culture required for good money management rather than what buttons to press.’

‘The most useful element of the course was understanding the wider picture and the impact of good cost centre management.’

‘Basically all of it was useful – including forecasting accurately, understanding financial terms such as debtors, creditors, accruals and how to record them.’

Effective culture change

Feedback on the CIPFA training has been extremely positive both from delegates and from the finance teams they work with. ‘While the majority clearly understand their roles and responsibilities, embedding culture change and behaviours is being supported as part of a wider range of activity across the organisation,” says Liz Firmstone.

As well as expanding managers’ understanding of the requirements on them to be accountable for sound financial management, feedback from delegates also highlighted some changes that were required within the finance service. Some of these were around processes and procedures, and others around support for managers. ‘For example, we need to ensure that we are focusing finance support on added-value activity and helping managers, such as enabling them to understand the financial and commercial implications of significant business decisions,” says Liz Firmstone.

Amie Hall, CIPFA Business Development Manager who liaised with WCC on the initial training agreement, believes the results reflect the benefits of a cooperative and supportive training partnership:

‘Training is often most impactful when it’s a true partnership between client and provider. When I first met with WCC, Liz was so supportive and keen to engage, and let CIPFA work with WCC to get this programme to succeed. It really shows what can be achieved when you have the right leadership and understanding of financial responsibility across the organisation.’