

Your NHS partner for  
improving health  
and integrating care



Midlands and Lancashire  
Commissioning Support Unit

# Business Case Training Prospectus

## Capital and Revenue Investments



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## Introduction

Welcome to the NHS England Business Cases Training Team, a cornerstone of NHS business education, hosted by Midlands and Lancashire Care System Support. As leaders in the field, we deliver the acclaimed HMT Better Business Cases™ Masterclass Programme, essential for all those involved in business case development and navigating business case approvals internally and at NHS England and DHSC.

Our virtual training portfolio is rich and diverse, offering Better Business Cases™ Foundation and Practitioner Level Masterclasses, underpinned by a candidate-focused approach and support that extends beyond traditional e-learning alongside practical, time-efficient Bite Size training. In addition, Bespoke Tailored Business Case Training can be provided to meet your unique organisational needs.

Boasting over a quarter-century of expertise each, our trainers are not just experts in business cases; they are experienced educators with an outstanding track record. Their knowledge elevates our training, achieving exceptional pass rates and setting industry standards.

Partner with us for training that encompasses the NHS, public, and private sectors. Benefit from the vast expertise of one of England's leading NHS care system support organisations, and take the first step towards mastering business case excellence.

**Tony Matthews**

Director of Finance | ML Care System Support

# Our expert team



## Sue Stockley

**FCA (ICAEW), BA(Hons) Accounting and Finance**

With an impressive career of 30 years in NHS finance, Sue brings a wealth of experience to the team, notably in capital investment appraisal across a myriad of projects. Her expertise spans the DHSC Private Finance Unit, Yorkshire and Humber SHA, and the NHS England Project Appraisal Unit, enriched further by her stint at Deloitte's Health PFI team. Sue possesses in-depth knowledge of the HMT Better Business Cases™ methodology, including the Green Book and Five Case Model, alongside proficiency in benefits management and the intricacies of NHS England's business case protocols.

**Key skills:** Business Case Training, Assurance, Appraisal and Approvals; Customer Service; Organisational and Planning Skills.

**Contact:** [sue.stockley@nhs.net](mailto:sue.stockley@nhs.net) | 07876 851896



## Michael Gemson

**FCA (ICAEW), BSc Economics**

Michael's 20-year tenure with the NHS, complemented by 15 years in the private sector, has equipped him with a robust commercial acumen, particularly in senior finance roles within global telecommunications giants like Cable and Wireless and Virgin Media. His multifaceted NHS experience, spanning primary to acute care sectors, complements his profound capability in training, assuring, and developing business cases. Michael's extensive knowledge is a cornerstone in enhancing the value of diverse business case assignments.

**Key skills:** Business Case Training and Assurance; Financial Modelling and Interpretation; Business Case Development, particularly economic and financial cases.

**Contact:** [michael.gemson@nhs.net](mailto:michael.gemson@nhs.net) | 07876 851844



## Glen Mackie

**ACMA (CIMA), BA(Hons) History and Law**

Glen Mackie's 35-year career in NHS finance spans an extensive array of roles within NHS England, Strategic Health Authorities, and NHS Acute Trusts. For the past 15 years, Glen has honed his specialism in NHS Capital, with a focus on training individuals in business case writing, appraisal, and capital pipeline management. His vital finance roles in financial and management accounting have endowed him with a broad spectrum of experience and expertise in system working and strategic finance.

**Key skills:** Business Case Training and Appraisal; NHS Technical Knowledge; Organisational Skills.

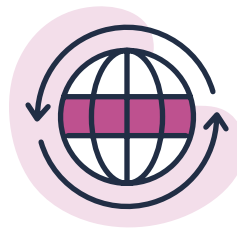
**Contact:** [glen.mackie@nhs.net](mailto:glen.mackie@nhs.net) | 07768 487701

# How we can help

## Master the art of business case crafting with our APMG-accredited training!



**Higher pass rates, better preparation:** Our Better Business Cases™ masterclass programme ensures that delegates are well-equipped with a comprehensive toolkit to develop sound and successful public sector business cases. Leveraging Microsoft Teams, we offer convenient access and preparation that leads to pass rates surpassing national averages.



**Qualifications that travel across sectors:** Attain Better Business Cases™ Foundation and Practitioner qualifications that are not only recognised but also versatile and applicable throughout the public sector. Our courses are content-rich and fully interactive, tailored to deliver NHS-focused learning or broadened for wider public and private sector applicability.

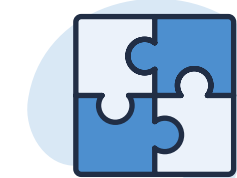


**From introduction to mastery:** Begin with our Foundation masterclass, introducing the Five Case Model, HMT Green Book, and Better Business Cases™ guidelines. Progress to our Practitioner masterclass to enhance your practical application skills, through engaging scenarios.



### **Bite size masterclasses for targeted learning:**

- Benefits management and realisation using NHS examples.
- The Comprehensive Investment Appraisal Model as implemented in the NHS.
- Financial appraisal and capital investment tailored for the NHS.
- Business case writing skills for small value schemes.
- Business case assurance within NHS frameworks.
- Post Project Evaluation.



**Customised training solutions:** In addition to our standard offerings, we craft bespoke tailored business case training to align with your organisation's unique needs.



**Equality:** If there are any issues to be considered, arrangements required such as additional Examination time or adaptations to enable you to access the training, our Training Unit is ready to accommodate your needs.



Contact us for **Better Business Cases™** and **Bespoke Training** at [mlcsu.nhsenglandbbc@nhs.net](mailto:mlcsu.nhsenglandbbc@nhs.net), and for **Bite Size Training** at [mlcsu.nhsenglandbitesize@nhs.net](mailto:mlcsu.nhsenglandbitesize@nhs.net). Please see our website for details on [how to enhance your business case skills with our accredited training](#).

# The programme

## NHS Better Business Cases™ Foundation Masterclass

### Unlock the potential of effective business case development

**Essential for:** Foundation is aimed at anyone who needs to understand the business case process and is involved in developing or reviewing a business case. Including decision makers, Senior Responsible Officers, Project managers and their teams and advisors. Essential for organisations seeking NHS England, DHSC and HMT approval.

**Course overview:** Dive into the world of business case development with our Foundation Masterclass. Master the Five Case Model, the HMT Green Book principles, and the official Better Business Cases™ guidelines. Learn to navigate through the strategic outline case (SOC), outline business case (OBC), and full business case (FBC) stages.

**Certification:** Earn a certificate upon passing the APMG examination, a stepping stone to the Practitioner level.

### Learning outcomes:

- Grasp the philosophy and rationale behind the Five Case Model.
- Distinguish between various business cases, their purposes, responsibilities, and timings within spending proposals.
- Integrate business case development with best practices in programme and project management.

**Duration:** 3 days, including the exam.

**CPD hours:** 14 hours.

**Progression:** This Foundation qualification is the gateway to the APMG Practitioner level, equipping you with the knowledge to contribute effectively within a team tasked with business case creation.

## NHS Better Business Cases™ Practitioner Masterclass

### Elevate your business case leadership skills

**Essential for:** Organisations advised to secure national approval by NHSE and/or the DHSC.

**Course overview:** Building on the Foundation Masterclass, this advanced course empowers those involved in the business case process. Delve deeper into the practical application of the HMT Green Book principles, the Five Case Model and Better Business Cases™ methodology to a given Scenario.

**Certification:** Earn a certificate upon passing the APMG examination.

### Learning outcomes:

- Validate your understanding of theory and practice related to the Five Case Model to craft and present solid business cases.

- Apply the Five Case Model effectively within your organisation, ensuring alignment with business objectives and strategic direction.
- Navigate the business case lifecycle, understanding the intricate relationships between the five cases.

**Duration:** 3.5 days, including exam and allocated study time.

**CPD hours:** 14 hours.

**Prerequisite:** A pass in the Foundation Masterclass is required to enrol in the Practitioner level.

**Outcome:** Post-course, you'll be equipped to apply the steps in the business case development framework to support actual projects with confidence and skill.

## Benefits Management and Realisation Training

**Maximise project impact with strategic benefits realisation**

**Course options:**

**One-day intensive:** Gain insights into the full lifecycle of benefit management and learn to identify, quantify and value benefits for economic analysis.

**Two-day comprehensive:** Designed to enhance skills in benefits management including practical worked examples of benefits measurement and valuation in the NHS.

**Key Topics:**

- Navigating the Benefit Management Life Cycle
- Integrating benefits into Economic and Comprehensive Investment Appraisals
- Assessing benefits across health, carbon reduction, travel time savings, clinical and estates management, workforce, and societal impacts.

**Duration:** 1 or 2 days

**CPD hours:** 5 hours or 8 hours respectively

## Comprehensive Investment Appraisal (CIA) Training

**Deep dive into investment appraisal for informed decision-making**

**Course options:**

**One-day intensive:** For those familiar with economic appraisal but new to the DHSC CIA Model.

**Two-day comprehensive:** For newcomers to investment appraisal, including a Q&A with DHSC economists.

**Learning objectives:**

- Mastery of the DHSC CIA Model supporting economic appraisals
- Key principles for appraising cost, benefits, and risks of investment projects
- Be able to input relevant data for options appraisals and interpret the results.

**Duration:** 1 or 2 days

**CPD hours:** 5 or 8 hours respectively

## Financial Appraisal Training

### Financial acumen for NHS business cases

**Overview:** A focused session on the financial elements of NHS business cases, delving into NHSE and DHSC financial approval requirements, technical modelling, sensitivity analysis, and the differentiation between economic and financial appraisals.

**Duration:** 3 hours

**CPD hours:** 3 hours

## Business Case Writing Skills for Small Value Schemes

### Crafting compelling small-value business cases with precision

**Overview:** Tailored for the development of small value cases, this course offers a step-by-step approach to developing the business case and key tips and recommendations regarding layout and content.

**Duration:** 1 day

**CPD hours:** 5 hours

## Business Case Assurance Training

### Ensuring excellence in business case review and assurance

**Overview:** Designed for those undertaking business case reviews. Focus areas for reviewers in the context of the HMT Guidance, NHS Fundamental Criteria and NHS Checklists; Common issues/tips with examples; Application to a scenario/case study.

**Prerequisite:** Minimum of 12 delegates required.

**Duration:** 2 days

**CPD hours:** 9 hours

## Post Project Evaluation

### Purpose, benefits and approach for a successful evaluation

**Overview:** Fundamentals for those involved in Post Project Evaluation - key planning considerations and NHS templates

**Duration:** 1 day

**CPD hours:** 5 hours

## Enrolment forms



[Download Better Business Cases™ training and Bespoke Tailored Training enrolment form](#)

Please email your completed form to: [mlcsu.nhsenglandbbc@nhs.net](mailto:mlcsu.nhsenglandbbc@nhs.net)



[Download Bite Size Training enrolment form](#)

Use form for Benefits Management and Realisation, Comprehensive Investment Appraisal (CIA) model, the Economic Appraisal, Financial Appraisal, Business Case Writing Skills for Small Value Schemes, Business Case Assurance.

Please email your completed form to: [mlcsu.nhsenglandbitesize@nhs.net](mailto:mlcsu.nhsenglandbitesize@nhs.net)

# What our training delegates say...

“

“Just want to say personally, like with the Foundation course I attended earlier this year, how great you both are at making sure everyone’s queries are answered and trying to make sure everyone is prepared in the best way possible.”

”

“

“I just wanted to send a special thanks for all your help and support through the BBC training course. I came into the course with minimal knowledge regarding business cases and found the course extremely insightful. I think the course was very well led and you provided so many helpful ways to assist with learning. I successfully passed my exam which, at the start of the week, I was unsure if I could be able to gain enough knowledge to achieve but with your support and guidance I did”

”

“

“I would very much like to thank you for all of your superb training, support and openness. The course has been enjoyable... You were a superb team. Thank you for all your kindness and support.”

”

“

“I know that praise is rare in the NHS so I just wanted to highlight how much I valued the course, and I will absolutely be recommending it to colleagues.”

”

“

“You excel at what you do. Best trainer I’ve ever had.”

”

“

“Thank you, Sue and Michael, for an extremely helpful course.”

”

“

“Thanks to Sue and Michael for amazing support.”

”



# Better Business Cases™ and Bite Size Training Prices

Please see our very competitive prices for the above courses. VAT is not chargeable to NHS Organisations covered by the NHS England VAT Divisional Registration.

We are happy to discuss any bespoke training requirements you may have, or group bookings of 10 or more candidates.

NHS organisations retain the ability to contact other accredited providers of this training should they choose to do so.

Please note regarding all NHSE Better Business Cases™ training materials (for example, slide packs, exercises, and supplementary information) that Better Business Cases™ is a trademark of His Majesty's Treasury and all rights are reserved. In accepting a place on the NHSE Better Business Cases™ course you agree that the content of all training materials provided in any format is copyright, and that they are provided based on being restricted for the personal use of the delegate only and should not otherwise be reproduced, adapted, or distributed in any way.

Course	Price
NHS Better Business Cases™ Foundation Masterclass	£490 (+ VAT where applicable) per delegate includes cost of the 3-day course, APMG examination, and invigilation.
NHS Better Business Cases™ Practitioner Masterclass	£575 (+ VAT where applicable) per delegate includes cost of the 3.5-day course, APMG examination, and invigilation.
Comprehensive Investment Appraisal (CIA) Masterclass	£125 (+ VAT where applicable) per delegate for the 1-day course £195 (+ VAT where applicable) per delegate for the DHSC Economist 2-day course
Benefits Management and Realisation (BMR) Masterclass	£125 (+ VAT where applicable) per delegate for the 1-day course. £195 (+ VAT where applicable) per delegate for the 2-day course.
Financial Appraisal & Capital Investment Guidance Masterclass	£60 (+ VAT where applicable) per delegate for the 3-hour course.
Business Case Writing Skills for Small Value Schemes Masterclass	£125 (+ VAT where applicable) per delegate for the 1-day course.
Business Case Assurance Masterclass	£195 (+ VAT where applicable) per delegate for the 2-day course.
Post Project Evaluation	£125 (+ VAT where applicable) per delegate for the 1-day course.

## Get to know us or get in touch

X: [@mlcsu](#) | Facebook: [@Midlandsandlancs](#) | LinkedIn: [Midlands and Lancashire Commissioning Support Unit](#) | [midlandsandlancashirecsu.nhs.uk](#)

