

## Job Description and Person Specification

<b>Job Title</b>	Finance Lead
<b>Directorate</b>	North Region
<b>Department/Team</b>	Delivery and Improvement
<b>Location</b>	Waterfront 4, Newcastle
<b>Grade</b>	3.3 / Band 8c
<b>Reports to</b>	Head of Finance
<b>Contractual notes</b>	Full-Time (37.5 hours / week) / Permanent

### **Job Summary/Purpose**

The post holder is a key member of the Business and finance team. The post holder will also be a member of the extended Delivery and Improvement Directorate team as part of a local Business and finance team.

The post holder is expected to support engagement for a portfolio of NHS Trusts under the guidance of a Head of Business and Finance. Consequently the postholder will develop strong working relationships with the senior finance leadership in those NHS Providers and with relevant colleagues in the Delivery and improvement Directorate and Clinical Directorate of NHS improvement.

The post holder will be able to demonstrate well developed analytical, business and influencing skills specifically, but not solely, in the areas of investment case development and review, financial planning (both revenue and capital) and cost recovery programmes. It is likely that the post holder will have a thorough knowledge of NHS Trust and Foundation Trust financial frameworks.

The post holder must be a qualified accountant and member of an accountancy body which is a member of the Consultative Committee of Accountancy Bodies (CCAB).

The job description and person specification are an outline of the tasks, responsibilities and outcomes required of the role. The job holder will carry out any other duties as may reasonably be required by their line manager. The job description and person specification may be reviewed on an ongoing basis in accordance with the changing needs of the Department and the Organisation.

### **Key Accountabilities**

### **Key Relationships**

- NHS England (Area Team)
- NHS Providers,
- All staff within the delivery and improvement directorate – more specifically locality leads and clinical leads managers
- NHS Improvement corporate finance team
- NHS Improvement executive support teams

### **Management and Leadership**

- Participate in an integrated way, with all NHS Improvement colleagues, the appropriate interventions to support provider organisations.
- Represent NHS improvement at regional and national meetings and events as requested.
- Ensure effective leadership and coherent strategic frameworks are in place to deliver specific portfolio topics and that agreed activities are effectively delivered.
- Significant impact with finance management of NHS Providers from a financial and business perspective.
- Well-developed influencing and relationship management skills necessary for working effectively within a matrix organisation

### **Business Delivery**

- To provide high quality business advice and support to a Delivery and Improvement team as directed by the Head of Business and Finance in the areas of finance and service impact.
- To advise and support the Senior management on necessary NHS Provider recovery and intervention activity consistent with the operating model.
- To support the Head of Business and finance in the provision of high quality business support and advice to a portfolio of NHS providers consistent with the single operating model of NHS Improvement.
- To develop and maintain strong working relationships with peer staff within the Finance and other directorates of NHS Improvement and to support the delivery of NHS Improvement corporate objectives.
- Well-developed interpersonal and communication skills to enable effective internal and external working.

### **Strategy Development**

- Capable of developing strategies and solutions to address financial and performance challenges within their portfolio of Trusts and to monitor and review implementation
- Capable of providing and advising on approaches to turnaround.
- Capable of providing innovative solutions in support of provider sustainability, mergers, acquisitions and procurements.

### **Operational requirements**

- Working within the overall strategic objectives, devise, implement and monitor the strategy. Evaluate, interpret and locally implement best practice.
- Provide overall management to the function.
- Develop and implement qualitative and quantitative measures to determine performance against the organisational strategy. Report progress against the strategy through personal representation at senior management forums and by written reports to appropriate boards and groups of staff.
- Present complex information on all aspects of function practice in a clear, understandable and audience-appropriate manner to senior management and board level groups.
- Ensure that best practice is developed and delivered at organisational and departmental levels. Challenge ways of working and persuade, motivate and influence other senior managers to realign their practice where necessary.
- Ensure a smooth transition through decision making process to the management of contracts.
- Ensure that an appropriate strategy is in line with business objective and are fully cascaded.
- Personally lead, support and contribute to formal negotiations with senior level staff from external stakeholders, providing a high level of negotiating expertise to secure the most advantageous arrangements.
- Advise on innovative opportunities and support all departments in their strategies and programmes to maximise service benefits.
- Oversee the tracking of progress against plans and transition milestones, ensuring appropriate processes are in place to flag issues, risks and concerns with the relevant stakeholders.
- Work closely with the Heads of other Department or Directorate to ensure that units understand and adhere to rules and standards, intervening as appropriate.
- Ensure the securing of value for money, giving due consideration to all relevant factors including risk, quality and other factors.
- Devise, manage and update policies and procedures, ensuring the adoption of best practice methodology, rules, standards and thresholds. Disseminating these methodologies etc. to staff within the department and throughout the organisation.
- Collect and report on information of expenditure within the organisation and other relevant governing bodies.

### **Financial and Physical Resources**

- The post holder will have budgetary responsibility for a function and the services provided within that function. This will include evaluating the value for money of new contracts, monitoring the performance of existing providers and ensuring that provider performance aligns, and complies, with contractual terms and conditions;
- The post holder will be directly responsible for all budgets associated with the management of the function.
- Act in a way that is compliant with Standing Orders and Standing

- Financial Instructions in the discharge of this responsibility.
- Constantly strive for value for money and greater efficiency in the use of these budgets and to ensure that they operate in recurrent financial balance year on year.

### **Information Management**

- Responsible for devising, developing and implementing appropriate information sharing systems to:
  - facilitate effective working practices for the end to end processes
  - ensure accurate analysis of management information.
- Lead the creation and implementation of information systems for collecting, evaluating and interpreting large volumes of intricate data on expenditure to inform the short, medium and long term strategies.
- Responsible for the operation and maintenance of information systems, adapting systems where necessary to suit changing information needs
- Responsible for the collection and reporting on information of expenditure both within and outside the organisation, including compliance reporting.
- Ensure processes and staff behaviours are in place for appropriate information sharing.

### **Research and Development**

- Ensures that relevant groups are able to access best practice and current information from supply markets
- Commissions Research and Development initiatives to secure cost and service improvements from alternative methods of operation, through new goods and services or re-engineering existing processes
- Ensures that benefits from research and development and from innovation are realised by stakeholder organisations

### **Planning and Organisation**

- Creates and implements Strategic Operations business plan, clearly identifying links to national, regional and local priorities and policy objectives.
- Contributes to the development and implementation of general policy and service development.
- Develops and implements strategies for improving performance
- Drives and leads development and improvement of processes.
- Ensures stakeholder representation is engaged throughout the cycle.
- Drives process efficiency in the continuous development of the end-to- end cycle and its associated performance metrics.
- Accountable for short, medium and long term business plans, achieving quality outcomes.
- Responsible for linking people, resource and strategy to organisational strategy.

### **Policy and Service Development**

- To identify and assess opportunities for new services and threats to existing services and market develops.
- Develop plans and seize opportunities, mitigate threats and deliver NHS's strategic objectives.
- Responsible for proposing and drafting changes, implementation and interpretation to policies, guidelines and service level agreements (SLA's) which may impact services and Sector.
- Proposes changes to own function making recommendations for other service delivery.
- Contribute to the review and development of existing information management systems and contribute to the development of an integrated approach to project management.
- The post holder will need to maintain a good knowledge of emerging policies from government departments for example pensions, change management, constitution. This will assist in the thinking and definition of the strategy discussions for the Network and stakeholders.

### **Role Dimensions**

#### **Key Relationships (External)**

- The post holder will be required to have regular contact internal and external stakeholders and will often need to engage with them over sensitive, complex, contentious and confidential issues.
- Participate in relevant internal and external working groups/projects, services and initiatives to provide project, information and analytical advice and expertise.
- Present project information and issues, explaining complexities, to a wide range of internal and external stakeholders.

#### **Key Relationships (Internal)**

- Overseeing the team to develop and implement project data collection systems that will provide accurate and timely data.
- To liaise with other Managers to share best practice.

#### **Numbers and types of staff managed**

Support and line manage the Department or Directorate.

- To forge positive working relationships, in order to support an effective matrix approach to achieve NHS objectives.
- To work in a matrix management style and to foster close working relations with other managers within the NHS.
- To manage, motivate and develop staff within the team to ensure that they are able to deliver the new responsibilities of the NHS. Including the management of disciplinary procedures as required, undertake staff consultation and consider welfare and safety matters, taking into account instructions and guidelines issued.

- To recruit as necessary and performance manage a team that delivers a range of tasks within a matrix structure in a new and challenging environment.
- Use appraisal and development policy and procedure at ensure that appraisals are undertaken regularly.

Factors	Description	Essential	Desirable
<b>Knowledge, Training and Experience</b>	Educated to masters level in relevant subject or equivalent level of experience of working at a similar level in specialist area	√	
	Proven and significant leadership experience.	√	
	Significant evidence of continued professional development	√	

	Demonstrated expertise in a Healthcare environment	√	
	Significant management experience at senior level in the NHS or other public healthcare related industry	√	
	Proven Board level experience of leading and delivering complex change and strategy development programmes in a politically sensitive and complex environment	√	
	Proven record in transferring processes and roles between locations.		√
	Significant experience and understanding of proven implementation of project management methodologies	√	
	Member of a relevant professional body	√	
	Experience and/or understanding of the health economy	√	
	Commercial expertise		√
	Awareness of relevant public and private sector business management best practice.		√
	Experience of successfully operating in and delivering priorities in a partnership environment		√
<b>Communication Skills</b>	Dynamic personality and the ability to build trusted stakeholder relationships and wide support networks	√	
	Strong external communications skills in a politically sensitive environment and experience in handling media	√	



	<p>Ability to prepare and produce concise yet insightful communications for dissemination to senior stakeholders and a broad range of stakeholders as required</p> <p>Extensive experience of delivering presentations to large groups of stakeholders in often pressured and politically sensitive environments</p>	<p>√</p> <p>√</p>	
<b>Analytical</b>	<p>Ability to analyse highly complex issues where material is conflicting and drawn from multiple sources</p> <p>Demonstrated capability to act upon incomplete information, using experience to make inferences and decision making</p> <p>Ability to analyse numerical and written data, assess options and draw appropriate initiatives</p>	<p>√</p> <p>√</p> <p>√</p>	
<b>Planning Skills</b>	<p>Leadership, vision, strategic thinking and planning with highly developed political skills</p> <p>Demonstrated capability to plan over short, medium and long-term timeframes and adjust plans and resource requirements accordingly</p> <p>Experience of managing and prioritising a large budget</p> <p>Ability to provide informative reporting on finances and impact to Board management</p> <p>Experience of project and programme management techniques and tools such as Prince 2 or Managing Successful Projects</p>	<p>√</p> <p>√</p> <p>√</p> <p>√</p>	<p>√</p>
<b>Autonomy</b>	<p>Demonstrated capabilities to manage own workload and make informed decisions in the absence of required information, working to tight and often changing timescales</p> <p>Ability to make decisions autonomously, when required, on difficult issues</p>	<p>√</p> <p>√</p>	

<b>Management Skills</b>	<p>Experience in leading a major change initiative with entrepreneurialism in a challenging organisational environment</p> <p>Experience of creating a new team and motivating and inspiring staff to work together to achieve a common objective</p> <p>Ability to delegate effectively</p> <p>Ability to work effectively between strategic and operational activities</p>	<p>√</p> <p>√</p> <p>√</p> <p>√</p>	
<b>Physical Skills</b>	<p>Working knowledge of Microsoft Office with intermediate keyboard skills</p>	<p>√</p>	
<b>Equality and Diversity</b>	<p>Will consider the most effective way to promote equality of opportunity and good working relationships in employment and service delivery and has the ability to take actions which support and promote this agenda</p>	<p>√</p>	

