

Job description

Job title: Deputy Head of Financial Planning & Business Partnering

Pay band: 8b

Hours: 37.5

Accountable to: Head of Financial Planning & Business Partnering

Location: NHS Resolution Leeds Offices or Homeworking (unless a successful internal applicant is already London based)

Purpose

The post holder is expected to fully understand, embrace and uphold NHS Resolution’s Purpose and Values:

“To provide expertise to the NHS on resolving concerns fairly, share learning for improvement and preserve resources for patient care.”

Values

Professional

Being an organisation which operates to the highest possible professional standards.

Expert

Being the centre of expertise for resolving claims, disputes and concerns about performance.

Ethical

Having high standards and doing the right thing.

Respectful

Dealing with customers, colleagues, patients and the public in a considerate and respectful way.

Key working relationships

Internal

- All NHS Resolution staff
- Directors and senior managers
- Project managers
- Finance, IT and HR teams

External

- Department of Health and Social Care
- External Auditors
- Internal Audit provider

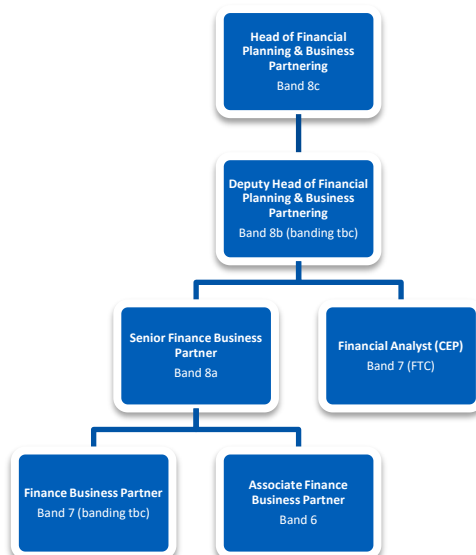
Job summary

The Deputy Head of Finance Business Partnering will be responsible for supporting the Head of the team in leading the team, focussing on handling strategic objectives. This role will cover key tasks such as month-end oversight, commission coordination, and preparation of corporate reports. The post holder would still maintain a small role in business partnering and provide cover to the Head of FP&BP when required.

This role will support oversight of the financial management and planning of NHS Resolution, including:

- Lead on the preparation of other corporate reports with oversight from the Head of Financial Planning & Business Partnering
- Ongoing financial management, forecasting and reporting of administrative budgets, including business partner support for specific directorates, providing financial oversight and challenge on business as usual and change activities
- Supporting the budget setting process which helps develop the annual business plan.
- Work closely with the resourcing team on workforce planning and forecasting.
- Providing support to project managers on the development of business cases for investment, for product development and pricing approaches
- Lead on the timely and accurate preparation of monthly management accounts, supporting the rest of the team in producing insightful reports
- Support the Head of Financial Planning & Business Partnering with any commissions from the Department on an ad hoc basis, including updates to headcount and spending reviews
- Be responsible for managing the Corporate Travel Management contract including updates and implementation of Travel & Expenditure policy.

Organisation chart



Main duties and responsibilities

- Supports the Head of Financial planning & Business Partnering in advising the senior management team and Board on financial management in the context of the financial position of NHR and the wider DHSC Group, including the development of financial plans and forecasts, and making recommendations for business efficiencies and performance improvements using influencing and persuasion skills.
- Collaborates with senior managers to develop financial strategies for investments in change programmes/projects and on development of commercial products/income generation strategies, ensuring that these are compliant with financial management frameworks for the public sector.
- Responsible for leading on the development of efficient and effective systems including using advanced technical skills and knowledge to streamline and improve business processes for routine activities, e.g. monthly reporting and forecasting, annual budgeting cycle, etc.
- Provide a comprehensive business partnering service to named directorates. This involves advising budget holders on their financial management in the context of the financial position of NHS Resolution, including the development of financial plans and forecasts, making recommendations for business efficiencies and performance improvements.
- Work with named directorates in tracking deliverables against Business Plan, feeding back results to wider organisation.
- Lead on DHSC commissions relating to financial planning or forecasting e.g. The government Spending Review.
- Using advanced technical skills and knowledge to contribute to developing long-term plans for management accounts which may impact on the whole organisation including identifying interdependencies, managing risks, modelling the potential impacts on the wider organisation,

- Deputise as appropriate as appropriate for various meetings with key stakeholders to facilitate the delivery of NHSR's strategic objectives.
- Be responsible for managing the Corporate Travel Management contract including updates and implementation of Travel & Expenditure policy.
- Assist wider Finance team and lead on Finance Business Partnering queries relating to year-end to help prepare the Annual Report and Accounts.

Communicates Effectively

- Responsible for producing reports including providing explanations and commentary for the monthly financial management reporting process, and able to explain highly complex financial concepts, which may also be contentious to non-finance stakeholders.
- Maintains a supportive yet challenging dialogue with senior managers, enabling them to develop and deliver their business whilst ensuring that they are managing within their delegated authorities and are cognisant of risk when taking decisions.
- Apply effective communication, negotiation and influencing skills to enable effective management with stakeholders at all levels (including senior management) who may hold differing and contentious views.
- Maintains an effective liaison at an appropriate level with finance and non-finance staff.

Analytical and Judging Skills

- Has knowledge and experience in a wide range of advanced accountancy techniques and can apply these in approaches to monthly accruals accounts, investment appraisals and pricing decisions, applying them appropriately to the situation in hand.
- Apply appropriate judgments and estimates in line with accounting standards being International Financial Reporting (IFRS) Standards and Government Financial Reporting Manual (FRoM), and circumstances arising from NHSR's activities in the preparation of monthly and annual accounts.
- Uses advanced technical / accounting knowledge and skills to analyse highly complex budgets and data sets for nominated directorates and interprets financial accounts; makes judgements on financial decisions and financial risk.

Supporting Information Services and Information Management

- Support the design, development, management, delivery and maintenance of IT systems and frameworks that will develop information across the organisation including the needs of others and effective planning.
- Oversee the collection, management and maintenance of data on forecasts and spending, building and maintaining models to estimate future spend on particular services, keeping records of authorisation in line with Standing Financial Instructions.

Planning, Organising and Delivering on Goals

Financial Management

- Responsible for leading on timely and accurate corporate reports, workforce reports and year-end forecasts in accordance with agreed reporting timescales, relevant policies and standards.
- Support monitoring of capital and revenue resource limits and ensuring that current levels are reflected in the budgets used by the NHS Resolution for monitoring and reporting.
- Investigate budget variances for named directorates to highlight any significant financial issue to managers and budget holders. Resolve any financial discrepancies and queries, which can be complex in nature, communicating findings and recommending appropriate action to address these issues. This requires analyses of highly complex information and the ability to assess financial risks and make decisions.
- Responsible for developing and implementing formal process for investment appraisals, such as for large capital expenditure projects. With collaboration with Financial Operations team, review and update Capex Policy which ties into the Government Financial Reporting Manual, purchase order regulations and requirements.
- Contribute to the continuous improvement of processes and procedures within the management accounts.

Financial Planning

- Lead the budget process for designated directorates and contribute as required to the organisations business planning process. Support the directors in the preparation of budgets in accordance with timetables and cost improvement programmes.
- Responsible for consolidating annual budgets and forecasts with oversight from the Head of Financial Planning & Business Partnering
- Provision of costing support including identifying how budgets and cost should be apportioned to discrete services.
- Provision of financial support and challenge to ensure robust business cases are produced. Provide detailed cost analysis as required.

Leadership, Develops Self and Others, and Teamwork

- Takes a leading role in promoting co-operation and in developing effective relationships across the organisation, and with key external stakeholders to deliver on the organisation's priorities.
- Act as a role model in taking a collaborative, flexible and customer-focused approach in the way the team carry out their responsibilities in their business partner role.
- Responsible for managing, supervising and developing a diverse, inclusive and high performing team, which will include supporting the recruitment and selection of new employees; training junior members of the team; contributing to annual appraisals and objective setting, where required; sickness absence management; performance, capability, grievance and disciplinary issues.

- Participate in the Annual Performance Appraisal process, sourcing and undertaking training as identified in the Personal Development Plan.
- Support, coach and mentor other members of staff to support their professional and personal development, ensuring that staff are appropriately supported and equipped with the relevant skills and knowledge to perform their duties effectively.
- Support any cultural and behavioural changes that would enable new ways of working that are fully aligned to the organisation and people strategies.
- Line management of other members of the team.

Effort and working environment

Physical effort

- The role requires physical skills such as speed and accuracy when producing financial information that is required within a tight deadline. This means gaining advanced keyboard skills acquired through training or experience.

Mental effort

- - intense concentration required for detailed analysis of -complex and sensitive issues. Analysing -complex streams of information to model into critical information for key decisions. Flexibility is required due to the unpredictable nature of demands on workload and interruptions on a daily basis.

Emotional effort

- Required to deal with staff appraisal, staff performance and disciplinary issues. Deal with grievances, customer complaints and patients directly regarding periodical payments.

Working conditions

- Required to use a VDU daily. Required to attend meetings away from the office.

Further information

1. The post holder must ensure that personal information for claimants, members of staff and all other individuals is accurate, up-to-date, kept secure and confidential at all times in compliance with the *Data Protection Act/General Data Protection Regulations 2018* and the *Common Law Duty of Confidentiality*.
2. The post holder must follow the record keeping guidelines established by NHS Resolution to ensure compliance with the *Freedom of Information Act 2000*.
3. The post holder is expected to take responsibility for self-development on a continuous basis, undertaking on-the-job and other training as required.

4. The post holder is required to become familiar and comply with NHS Resolution policies and procedures.
5. The post holder must be aware of individual responsibilities under the *Health and Safety at Work Act* and identify and report, as necessary, any untoward accident, incident or potentially hazardous environment.
6. The post holder is expected to develop IT skills.
7. The post holder may be required to undertake duties at any location within NHS Resolution, in order to meet service needs.
8. This job description and person specification are intended as a guide to the main responsibilities and profile of the post and not as an exhaustive list of duties and tasks. The post holder may be required to undertake other duties appropriate to the post's grades, which are not listed above, at the direction of a manager. The job description may be amended from time to time after consultation with the post holder.
9. NHS Resolution operates *No Smoking Policy* and *No Alcohol policies*.

Person specification

Category	Criteria	Essential (E) Desirable (D)	How tested*
Education & Qualifications	CCAB accountancy qualification (CIMA/ACCA or equivalent) and experience of working at a senior level	E	A & I
	Able to demonstrate commitment to continuing professional development	E	A & I
	Project Management Qualification	D	A & I
Skills & Abilities	Ability to lead, manage and motivate staff	E	A & I
	Excellent verbal and written communication skills	E	A & I
	Highly numerate, good analytical skills	E	A & I
	Excellent computer skills, including Excel, Word and financial software packages	E	A & I
	Able to deal with and explain complex and technical financial accounting issues	E	A & I
	Able to analyse and interpret complex information, financial data and statistics to assess issues, anticipate problems and provide workable solutions	E	A & I
Experience	Able to plan work and respond to pressure such that all deadlines are met	E	A & I
	Financial management experience in the NHS/wider public sector environment and application and/or commercial business	E	A & I
	Experience in development of commercial products and pricing approaches	D	A & I
	Ability to work effectively as part of a multi-disciplinary team at all levels of the organisation, acting as a business partner	E	A & I
	Excellent people management skills	E	A & I
	Experience of dealing with internal and external auditors	D	A & I
	Significant stakeholder experience and the ability to influence at a senior level across NHR	E	A & I
Knowledge & Understanding	Experience in producing and presenting clear and understandable financial information, reports and analysis	E	A & I
	Knowledge of financial management and accounting systems and processes	E	A & I
	Knowledge of NHS and public sector financial management frameworks, principles and procedures	D	A & I

Category	Criteria	Essential (E) Desirable (D)	How tested*
	Knowledge of finance partnering techniques and best practice including implementation	E	A & I
	Knowledge and understanding of Management Accounting techniques such as forecasting techniques, costing, budgeting, investment appraisal and pricing approaches	E	A & I
Other	Post holders are required to ensure their professional skills are kept up to date through Continued Professional Development, in accordance with their professional body	E	A & I

* A – application form; I – interview; T – test, P - presentation