

# Join us at UHB



Building healthier lives

# Welcome from our CEO

Jonathan Brotherton



Dear Candidate,

Thank you for your interest in working with us here at University Hospitals Birmingham NHS Foundation Trust (UHB).

Please take some time to read through this application pack to gain a better understanding of our Trust in general, this role in particular, and why UHB is a great place to work.

UHB is one of the largest teaching hospital trusts in England, serving a local, regional, national, and international population. We employ around 22,000 colleagues and are committed to investing in your training, development, health and wellbeing and future career with us.

We see and treat more than 2.2 million patients every year across our four hospital sites - Good Hope, Heartlands, Queen Elizabeth Hospital Birmingham and Solihull Hospital - and through our community services and clinics. We are centres of excellence in many clinical specialties.

But it's not just our patients we invest in at UHB; we also invest in our staff. In fact, we believe we are defined by our people, not the state-of-the-art equipment or facilities we work out of. We have high standards and we want to build healthier lives for patients and our teams, wanting you to enjoy your job, and flourish in it.

To reinforce this commitment, we recently refreshed our values after hearing from over 1,400 colleagues about what made them proud to work at UHB

We will be:

**Kind:** the kindness that people show to each other every day

**Connected:** the connections we build with everyone around us

**Bold:** the ability to be bold in how we think, speak and act

We hope you find this pack useful and look forward to receiving an application from you for this role within our Trust.

Yours sincerely,

A handwritten signature in dark ink, appearing to read 'J Brotherton', written in a cursive style.

Jonathan Brotherton  
Chief Executive Officer

## JOB DESCRIPTION

<b>Job Title</b>	Deputy Divisional Director of Finance
<b>Pay Band</b>	8B
<b>Department</b>	Financial Management
<b>Division</b>	Finance
<b>Reports to</b>	Divisional Director of Finance
<b>Professionally Responsible to</b>	Divisional Director of Finance

### JOB SUMMARY

The Deputy Divisional Director of Finance (Deputy DDoF) will be the trusted financial advisor to a number of services within a Division. You will be influencing day to day decision making across the services to maximise value for patients whilst maintaining strong financial control in line with Trust processes and striving to deliver on productivity improvements.

Reporting to the Divisional Director of Finance (DDoF), the post holder will take a lead role in a variety of areas for the whole Division, which may include but not limited to:

- Provision of a high quality business partnering service to the operational and clinical teams to drive insight and timely and astute decision making
- Managing the delivery of accurate and timely monthly performance reports for agreement with the DDoF for presentation at Divisional Board Meetings and to feed into the Trust position for internal and external corporate reporting and statutory returns.
- The post holder will oversee the preparation of robust Divisional forecasts to be agreed with the DDoF. This will include supporting the planning and monitoring of mitigating actions
- Lead discussions on the financial performance of the Division. To discuss, contend and appropriately challenge general managers and senior clinicians on financial matters and highlight the financial implications of non-financial decisions.
- Support the Division on identification of productivity and efficiency opportunities, by using financial, analytical and project management skills, to ensure divisional targets are delivered on time
- Responsibility for leading the annual financial planning process for the Division, including challenging and negotiating service developments and cost pressures within the divisional operational and clinical teams
- Lead the production of financial information, providing efficient and effective systems to explain current performance, forecast future performance and satisfy external requirements
- Ensure that a benefits tracking programme is developed and implemented to track business case performance
- Responsibility for creating a culture of continuous improvement within the finance team
- Guide the Divisional finance team in ensuring a comprehensive and efficient finance service is provided to divisional managers, senior managers, budget holders and external stakeholders

The Deputy DDoF will be accountable for the management of the finance team that supports the services within their remit. This will include staff development and all performance and disciplinary issues within their structure. Alongside this, they will act as the first point of contact for staffing related issues for all other services within the Division.

The Deputy DDoF will be required to deputise effectively for the DDoF as and when required. As such the post holder will need to develop an advanced understanding of the Division as a whole.

The right candidate will boast skills in communication, developing key stakeholder relationships and leading a

team.

The post holder must have a recognised CCAB or equivalent qualification, and have experience in similar roles within finance and be fully committed to Continuous Professional Development.

#### KEY WORKING RELATIONSHIPS:

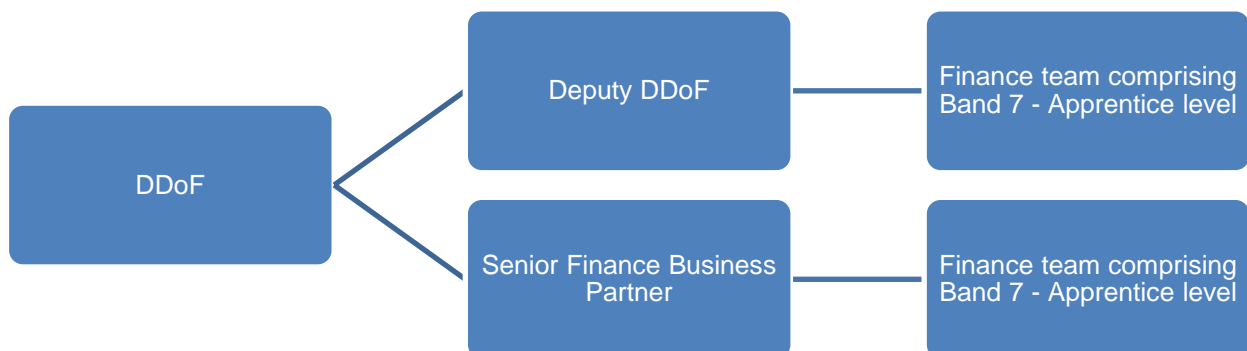
##### Internal:

Divisional Directors of Finance  
Director of Financial Management  
Managing Directors, Directors of Operations and General Managers  
Other members of the Divisional Management Team  
Clinical Service Leads  
Deputy Chief Operating Officers  
Chief Operating Officer  
Chief Financial Officer  
Deputy Chief Financial Officer  
Other Senior Finance Managers  
Divisional Finance Teams  
Budget Holders

##### External:

Representatives of External Bodies, Suppliers, Finance Staff in other Trusts

#### TEAM/DEPARTMENT STRUCTURE CHART



#### KEY SKILLS

- These are covered in the Job Specification section

#### KEY RESPONSIBILITIES

#### MAIN DUTIES & RESPONSIBILITIES:

## **PLANNING & DEVELOPMENT**

1. Provide business leadership to the Divisional team (finance, operational and clinical), ensuring a cohesive approach to income, activity, expenditure and workforce monitoring. This ensures effective use of financial resources in pursuit of agreed Divisional and Corporate goals
2. To be responsible for ensuring that monthly performance monitoring reports are robust and that key management decisions are based on accurate business information and all risks are assessed
3. To provide senior management support and leadership to the Divisional finance team and to liaise with other finance teams e.g. income and financial services to ensure the reported financial position is accurate
4. To co-ordinate all aspects of financial planning including budget setting, service developments and savings initiative programmes in accordance with NHSE/I and internal timetables for the whole Division.
5. Advising on short, medium and long term strategic, financial and business planning issues for all services within the Division
6. To implement full appraisals of developments, efficiency and mitigation plans
7. Play a key role in ensuring that costs are linked with service outcomes allowing comparison with activity information
8. Work closely with services to develop capacity plans and service re-design, assessing the impact on income and marginal costs in the delivery of business plans, and challenging operational assumptions
9. To lead on the financial appraisal of higher value or complex projects and service developments for the Division
10. Continually identify, review, highlight and promote internal best practice and improvement ideas, translating these into information that inspires and generates progress against the Divisional and Trust financial strategy

## **PERFORMANCE MONITORING**

1. Through the provision of expert financial advice, support services to develop and implement robust business cases, ensuring that the financial impact of the case is transparent, and understood by all decisions makers and stakeholders
2. Lead and co-ordinate Divisional benchmarking initiatives to improve efficiency and identify cost-savings. This will include monitoring non-financial performance indicators (e.g. length of stay, theatre utilisation) to identify areas where the use of resources can be improved. Working with operational and clinical colleagues to improve productivity and demonstrate the impact of these initiatives on financial performance.
3. Be accountable for maintaining the CIP tracker to ensure that:
  - a. Delivery/performance for the Division is being accurately reported in real time
  - b. Ensure schemes are RAG rated appropriately to prompt formulation of rectification plans when required
  - c. Ensure sufficient project milestones are in place to provide assurance of delivery
  - d. Maintain a robust audit trail to demonstrate delivery
4. To influence operational managers/clinicians into taking corrective action including where there are complex and contentious issues to resolve regarding use of resources.
5. To provide specialist and expert professional advice to budget holders with regards to budgetary and financial control
6. To lead on the financial appraisal of higher value or complex projects and service developments
7. Co-ordinate with the Financial Performance team to identify trust wide initiatives, share best practice and ensure the accurate, consistent and timely reporting of progress against KPIs
8. Contribute to the development of costing methodologies and mechanisms to ensure that all hospital costs are accurately reflected in prices and Reference Costs/PLICS
9. Negotiate Service Level Agreements with external organisations for services provided by or received by the

- Division to ensure that income is maximised or best value for money is achieved respectively.
10. With the support of the procurement department, negotiate external contracts with suppliers.
  11. Co-ordinate with the Financial Performance team to identify trust wide initiatives, share best practice and ensure the accurate, consistent and timely reporting of progress against KPIs

#### **LEADERSHIP AND MANAGEMENT**

1. The post holder will be required to communicate highly complex and multifaceted information to teams with varying degrees of understanding so should be able to adapt their communication style to match their audience. There may also be times when the information and way forward are internally and externally sensitive and/or contentious, so the post holder should demonstrate tact, diplomacy and the ability to defend their argument succinctly and confidently
2. To provide high quality advice and education on highly complex business management issues in order to improve financial awareness
3. To actively contribute to the Trust's financial management training programme for non-finance staff including the design of training material and facilitation and presentation at training events
4. To participate proactively in Trust projects as allocated
5. To ensure best practice in financial management is implemented within the Divisional finance team and across the wider financial management department
6. Lead, coach and manage the performance of the team in line with good people management practices. Ensuring excellence is recognised and underperformance is addressed.
7. Participate in regular performance appraisal meetings and ensure each member of the team has a clear set of objectives and development plans.
8. Ensure the team's compliance with all statutory, mandatory training together with any professional training requirements, ensuring they are up to date and fully compliant.
9. Manage team absences including sickness in line with Trust policy ensuring the appropriate return to work meetings occur, e-roster is updated and productivity is at keep to the highest possible level.
10. Identify and fill any vacancies that arise within the team in line with the Trust's recruitment policy and process.
11. Ensure overall wellbeing of the team is maintained. Continuously support in improving the morale of the team and implementing a culture of zero-tolerance for bullying and harassment.

#### **PROFESSIONAL RESPONSIBILITIES OR FINANCIAL POLICIES AND PROCEDURES**

1. Accountable for the operation of the general ledger system (both SAGE and Oracle) for services to ensure the accurate and consistent production of monthly financial and performance management information, including the monthly management accounts, within the timescales determined by the Trust.
2. Ensure that reports are of the highest quality by actively contributing to the quality assurance process and ensuring that key validations and reconciliations are completed.
3. Ensure that clear audit trails and working papers are maintained to demonstrate compliance with Trust financial procedures and International Financial Reporting Standards (IFRS).
4. To implement and lead on the coordination and validation of the monthly income and expenditure position, including forecasts to year end, analysis and interpretation of significant variances where appropriate
5. Contribute fully to the development of corporate financial policies, strategies and systems and adhere to these in the performance of the duties of the post. Identify opportunities to improve and develop system based working practices, taking a lead for the Trust if required.
6. Ensure that budget holders within the Division are trained in and comply with the Trust's Corporate Governance requirements as set out in the Standing Orders, Standing Financial Instructions and Scheme of Delegation.
7. Responsible within the Division for developing and maintaining processes which deliver the Trust's

Financial Accounting objectives for:

- Accounts Payable including compliance with the Public Sector Payment Policy.
- Accounts Receivable including improved debt recovery.
- Treasury Management including improvement of the Trust's cash flow.
- Statutory Accounting including the production of the Annual Accounts and monthly returns for NHSI.

This will require close working with the relevant finance teams and budget holders to deliver a range of processes and key performance indicators to support these objectives

8. Negotiate with NHS / external organisations over cost / service issues to resolve disputes to facilitate payment and improve cash-flow. This will include leading on complex negotiations for the Division, not just for the services within the post holders remit.
9. Responsible for ensuring that the monthly financial performance information is communicated to budget holders within the Division and that any issues raised are addressed in an appropriate, timely fashion.
10. To undertake quarterly reviews of the financial control within the business unit and prepare reports and risk assessments based on information gathered
11. To develop, and implement where appropriate, new improved methods of reporting
12. To undertake Continuing Professional Development (CPD) in line with the relevant institute requirements.
13. The post holder will undertake other duties as may be required to achieve the Trust's objectives, commensurate with the grading of the post

#### **BUDGETARY AND RESOURCE MANAGEMENT**

To provide specialist and expert professional advice to budget holders with regards to budgetary and financial control  
To deputise for the DDoF as and when required at senior meetings. This includes making decisions on behalf of the DDoF and acting as a signatory on their behalf where this is in line with Trust policies and procedures  
To co-ordinate all aspects of financial planning including budget setting, service developments and savings initiative programmes in accordance with NHSE/I and internal timetables for the whole Division.

#### **MANAGEMENT , SUPERVISORY, TEACHING, TRAINING RESPONSIBILITIES**

##### **STAFF MANAGEMENT**

1. Lead, coach and manage the performance of the team in line with good people management practices. Ensuring excellence is recognised and underperformance is addressed.
2. Participate in regular performance appraisal meetings and ensure each member of the team has a clear set of objectives and development plans.
3. Ensure the teams compliance with all statutory, mandatory training together with any professional training requirements, ensuring they are up to date and fully compliant.
4. Manage team absences including sickness in line with Trust policy ensuring the appropriate return to work meetings occur, e-roster is updated and productivity is at keep to the highest possible level.
5. Identify and fill any vacancies that arise within the team in line with the Trust's recruitment policy and process.
6. Ensure overall wellbeing of the team is maintained. Continuously support in improving the morale of the team and implementing a culture of zero-tolerance for bullying and harassment.

##### **EDUCATION AND TRAINING**

1. Maintain an up to date, in depth specialist knowledge – theory and experience – of financial and accounting procedures, financial aspects of NHS legislation and NHS financial policies.

2. Contribute to the development of a training strategy in financial and performance matters in conjunction with the department's Finance Workforce Manager.
3. Ensure that Standing Financial Instructions (SFIs) are followed within the Division, involving training and advising staff and monitoring compliance. Where breaches are discovered, ensure appropriate action is taken, in compliance with Trust policies.
4. Participate in the training of financial and non-financial staff in financial and performance matters where necessary.
5. Ensure Financial Management training programmes for managers at all levels throughout the Trust are operational, relevant and well delivered.

## RESEARCH AND DEVELOPMENT

To undertake quarterly reviews of the financial control within the business unit and prepare reports and risk assessments based on information gathered

## EFFORT

### Physical Effort

This is largely an office based job, requiring long periods of time (sometimes all day) working at a desk, on a PC. The post-holder will also be required to make regular visits to the hospital sites for internal meetings. Travel outside the Trust will also be required from time to time, usually within the West Midlands area.

### Mental Effort

The job requires an ability to concentrate for long periods of time. Complex calculations and analysis need to be carried out – often at very short notice and under pressure. At certain times, large quantities of data will need to be accurately input to the general ledger to strict time deadlines. Month-end and year-end are particularly busy times when long hours may be required at short notice to meet reporting deadlines. The post holder is expected to be able to maintain concentration throughout the working day to ensure that high quality, accurate work is produced.

### Emotional Effort

Emotional effort is required to deal with the stress related to the requirement to inform senior managers and clinicians of resource limitations that prevent them from taking a preferred course of action. The post-holder will also be required to challenge senior staff regarding assumptions regarding resource requirements/performance monitoring data. This may be in a 1:1 situation or may be in a formal meeting (e.g. Group Board meeting), which can be difficult and stressful and requires high quality influencing skills

The job requires the processing of sensitive data relating to patients.

Resolving pay queries frequently involves the jobholder with delicate discussions with staff, which can be difficult and heated and require exercise of tact and respect of privacy needs.

Frequent concentration with unpredictable work patterns.

Requirement to concentrate for long periods when analysing complex data, preparing financial reports, inputting data, checking and reconciling information – frequently throughout the working day.

Requirement to complete tasks at short notice.

Negotiating disputes with external bodies can also be stressful.

## TRUST VISION & VALUES

*DO NOT AMEND THIS SECTION*

The Trust is clear on its vision and values and aims to make sure that they are reflected in all areas of activity. Our vision is simple; building healthier lives. Our values apply to every member of staff and help us in all we do and how we do it. They are:

**Kind:** The kindness that people show to each other every day

**Connected:** The connections we build with everyone around us

**Bold:** The ability to be bold in how we think, speak and act

#### **ADDITIONAL INFORMATION**

This job description is designed to assist post holders with understanding what is expected of them in their role. University Hospitals Birmingham NHS Foundation Trust may ask them to undertake other duties, as required, which are not necessarily specified on the job description but which are commensurate with the grade of the post.

The job description itself may be amended from time to time in consultation with the post holder, within the scope and general level of responsibility attached to the post.

All post holders must take responsibility to ensure that they are aware of and adhere to all Trust policies, procedures and guidelines relating to their employment regardless of their position within the Trust.

Last Updated: .....



## PERSON SPECIFICATION

<b>JOB TITLE:</b> Deputy Divisional Director of Finance	
<b>TRAINING, QUALIFICATIONS AND PROFESSIONAL REGISTRATIONS</b>	
ESSENTIAL	DESIRABLE
<p>Recognised Professional Accountancy Qualification – i.e. Fully Qualified member of CCAB (as per HFMA national finance profiles definition). (E)</p> <p>Completion of evidenced ongoing continuing professional development, in accordance with guidelines produced by the relevant Professional Accountancy Body. (E)</p>	
<b>EXPERIENCE &amp; KNOWLEDGE</b>	
ESSENTIAL	DESIRABLE
<p>Track record of leading change in a complex organisation (E)</p> <p>Experience of multi professional collaboration at a senior level. (E)</p> <p>Development and utilisation of internal and external benchmarking techniques including the use within business case appraisal. (E)</p> <p>Experience of leading, managing and developing a team. (E)</p> <p>Experience of suggesting and making changes to local systems and processes. (E)</p> <p>Extensive relevant experience of Financial Management. (E)</p>	<p>Evidence of delivering savings within a health or social care setting (D)</p> <p>Specialist, expert knowledge of specific NHS policies/procedures for example Payment by Results, Coding, Patient Choice, Foundation Trusts, GIRFT, Model Hospital (D)</p> <p>Good working knowledge of and proven interest in the NHS including understanding of key targets and the performance management framework. (D)</p> <p>Up to date, in depth knowledge of Financial and Management Accounting procedures including International Financial Reporting Standards (IFRS). (D)</p> <p>Familiarity with relevant changes in clinical practice and the consequent impact on resource utilisation. (D)</p>
<b>SKILLS &amp; ABILITY</b>	
ESSENTIAL	DESIRABLE
<p>Excellent written communication skills including the ability to summarise highly complex financial issues into concise financial reports and prepare complex, multi- faceted business cases. (E)</p> <p>Good verbal communication and presentation skills including the ability to explain highly complex financial issues clearly and persuasively to non-financial staff and communicate sensitive or contentious information in order to influence decision making. (E)</p> <p>Excellent negotiation skills are required to overcome barriers to understanding arising from the complexity of issues. The ability to empathise with a conflicting point of view and work in a co-operative way in order to facilitate a workable compromise is essential. (E)</p>	<p>Comprehensive IT skills including the use of Financial Systems / General Ledgers. Experience with Microsoft Office products/other software packages including the ability to design highly complex spreadsheets, reports and databases to manipulate and analyse technical data and convert it into an accessible, user-friendly format. (D)</p>

<p>Standard keyboard skills. (E)</p> <p>Strong inter-personal skills including the ability to establish and maintain positive working relationships with colleagues at all levels from within the organisation and external stakeholders (E)</p> <p>Awareness of organisational politics in order to keep healthcare professionals on board with the change and resource management agenda. (E)</p> <p>Ability to effectively lead and motivate teams to manage change and achieve organisational goals (E)</p> <p>Flexibility to work autonomously with the skills to make decisions independently and delegate effectively (E)</p> <p>Proven ability to use own initiative, prioritise work to meet tight deadlines delegate appropriately and apply problem solving skills effectively. (E)</p> <p>Good understanding of operational issues and how organisational pressures affect broader resource utilisation. (E)</p> <p>Experience of transformation and change management (E)</p> <p>Strong analytical skills including the ability to make sound judgements and decisions on highly complex issues to minimise financial risk in situations where there is a multiplicity of targets / objectives, imperfect information and no obvious precedent. (E)</p> <p>Ability to make judgements on financial risks where expert opinions may conflict is required. (E)</p> <p>Ability to remain calm and perform consistently in stressful situations, including formal meetings with Executive Directors and senior staff from external organisations. (E)</p> <p>Confidence to advise on certain courses of action/decisions which may have far-reaching and long-term strategic consequences for the Trust. (E)</p>	
<b>OTHER SPECIFIC REQUIREMENT</b>	
<b>ESSENTIAL</b>	<b>DESIRABLE</b>
Commitment to development and training of staff (E)	Member of the HFMA (D)
Willingness to learn (E)	

<p>High levels of personal integrity and displays smart appearance (E)</p> <p>Adhere to and ensure compliance with relevant Health and Safety legislation. (E)</p> <p>Reliable, punctual, proactive approach. (E)</p> <p>Ability to travel to fulfil the role, both between hospital sites and elsewhere, as required. (E)</p>	
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