

JOB DESCRIPTION

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| **JOB DETAILS** | |
| **Job Title** | Associate Finance Business Partner – Division/Care Group |
| **Reports to** | Finance Business Partner – Division/Care Group |
| **Band** | Band 7 |
| **Department/Directorate** | Finance Directorate |

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| **JOB PURPOSE** |
| * The Associate Finance Business Partner is a pivotal role supporting the Finance Business Partners in ensuring that the Trust meets the key financial objectives set whilst delivering safe and sustainable services to our patients. * The post holder will deliver professional and timely financial support and be fully integrated with the core activities within the organisation whilst challenging and holding budget managers to account. * Furthermore the post holder will contribute to developing a culture of strong financial stewardship within the Trust, promoting the need for economy, efficiency and effectiveness in all aspects of the Trust’s business. * The Associate Finance Business Partners may work across more than one division to support the technical elements of the financial processes but also take responsibility for trust wide elements of the work programme   **K** |
| **KEY RESULT AREAS/PRINCIPAL DUTIES AND RESPONSIBILITIES** |
| |  | | --- | | * Supporting the Finance Business Partners discharge their responsibilities by providing high quality financial information, expert advice, training, support and challenge to the division in respect of financial management, reporting, and risk mitigation to ensure its senior managers and budget holders meet their key operational and strategic business objectives. * Assimilate and advise on highly complex issues and assists the Finance Business Partner by contributing to the continued development, provision and maintenance of robust financial management systems that support the Trust’s strategic and operational management. * Assist the Finance Business Partner to inform the Trust’s financial strategy and developing financial and performance monitoring systems to ensure all key financial and performance objectives are achieved. * Support the Trust’s business planning processes, including the development of business cases for service change to deliver cost savings, increased efficiency and increase income. * Support the Finance Business Partner in the preparation of the Trust’s annual national cost collection and proactively support the continuing development of patient level costing and Service Level Reporting across the Trust by fostering positive, proactive, collaborative working relationships with service managers and clinicians. * Manage the monthly closedown process within the business partnering function, overseen by the Business Partner for each division, ensuring robust financial reporting and forecasting, allowing the reporting to be consolidated to provide a trust wide view that is both consistent and of a high standard * Support development of financial reporting to the organisation so that information flows from the Trust wide Integrated Performance Report through to individual Care Group/Divisional reports to hold to account those responsible for delivery. The post holder will ensure a clear articulation of reported risks with mitigations reported to the Finance Business Partner allowing the flow from Care Group/Divisional positions through to the trust board. * Support the annual financial planning and budget setting exercise for the division ensuring that there is full engagement with the wider organisation and that finance, activity and workforce assumptions are aligned to enable a balanced budget to be presented to the Trust Board * To attend and service relevant Care Group/Divisional Committee’s and Sub Committees, which include answering any detailed questions on financial performance as required. * Ensure desk top procedure notes are developed and maintained for all tasks under the post holders control. * Oversee the Trust wide contractual income reporting * Take a Trust wide lead role in one of the following areas to support the head of Business Support in the modelling and consolidation of planning and reporting:   1. Cost Improvement Programme  2. Annual Operational Planning  3. Medium term financial recover, drivers of the deficit and benchmarking   * Line management responsibilities for Band 2 to 6 Business Partnering staff within the business support function   The post holder will also be expected to contribute to developing the vision, strategy and plans for the Business Support function by ensuring they possess the right skills and capabilities obtained through a programme of continuous professional development and supporting financial training for the organisation.  The Associate Finance Business Partner - will be based either at Newcourt House, Exeter or Devonshire House, Barnstaple but may be required to travel to alternate sites on occasion. | |
| **KEY WORKING RELATIONSHIPS** |
| * Care Group/Divisional Care Group Managers, Group Managers, Service Managers and clinicians to help drive delivery of financial objectives, service change and Service Level Reporting. * Other Finance Business Partners including the Finance Business Partner for Costing and SLR, to develop the Trust’s costing and reporting systems in line with the requirements of Service Level Reporting * Budget Managers to help drive shared financial accountability. * All finance staff * Internal and External Audit as required in line with the Audit Programme. * Finance colleagues within the STP to improve the collaboration between organisations and help support STP programmes of work * Trust Directors, in particular the Chief Operating Officer and the Deputy Chief Operating officer to maintain the direct link with Finance and Operations |
| **ORGANISATIONAL CHART** |
| A copy of the proposed organisational structure is attached top to the job description  The reporting structure for the Business Partnering Division is set out below: |
| **FREEDOM TO ACT** |
| The post holder will need to   * Make decisions autonomously on a regular basis with regards to financial planning, advising the Head of Clinical Business Partnering & Reporting / Head of Corporate Business Partnering & Planning of the impacts of these decisions. * Influence decision making throughout the division through the provision of expert financial advice * Interpret national policy and regulations, taking action to ensure the Trust meets the requirements of such policies and advising the Finance Business Partner of the interpretation made. |
| **COMMUNICATION/RELATIONSHIP SKILLS** |
| The post holder will be required to:   * Communicate and provide highly complex information to a wide range of internal and external stakeholders. * Use highly developed negotiation and persuasion skills to overcome barriers and obstacles to the delivery of financial objectives in particular where staff, partners and other stakeholders are resistant and/or the post holder has no direct line management relationship. * Present highly complex information about projects, initiatives and services to a wide range of stakeholders in a formal setting. * Commit to working and engaging constructively with internal and external stakeholders on a range of contentious issues. * Nurture key relationships and maintain networks internally, specifically with clinical and service leaders by developing a culture of shared responsibility for financial issues. * Support collaborative working across partner organisations * Assist with Freedom of Information requests |
| **ANALYTICAL/JUDGEMENTAL SKILLS** |
| The post holder will be required to support the Finance Business Partner   * Ensure that the systems for control and management of the Trust’s finances is in accordance with Standing Financial Instructions (SFIs) and statutory obligations are robust, to ensure that all Care Group/Divisional financial targets are met. * Ensure appropriate financial systems and processes are adhered to allowing accurate assessment of activity and financial performance, identify and report in-year risks and forecast year-end financial positions for the division to the agreed monthly reporting cycle. * Ensure all financial risks of the division are appropriately identified and reported to the Finance Business Partner so that mitigating actions are in place to deliver the agreed Care Group/Divisional plan. * Ensure that the financial impact of the Trust’s annual operational plan and strategic financial plan is understood by the division. * Prepare Care Group/Divisional finance reports and briefings on financial performance and financial monitoring of Care Group/Divisional recovery plans. * Support the control and delivery of the financial elements of the Care Group/Divisional Financial Recovery Programme and implement corrective actions with Care Group/Divisional leads * To work closely with Care Group/Divisional leads and budget managers to ensure that expenditure remains within budget and any remedial actions taken and opportunities to maximise income are met. * Support the Finance Business Partner and Care Group/Divisional Managers with budgetary responsibility to ensure financial control is exercised effectively, including the provision of training and development and resolving budgetary issues. |
| **PLANNING/ORGANISATIONAL SKILLS** |
| The post holder will be required to:   * Support the annual financial planning cycle supporting the Finance Business Partners in ensuring that robust processes are established and operated for setting Care Group/Divisional revenue in line with the Trust’s financial planning guidance. * Support the annual national cost collection exercise as directed by the Finance Business Partner. * To deliver presentations and financial training to increase financial awareness and understanding across the division. * To ensure that all budget managers within the division have access to accurate and timely financial information that aids their individual business planning. * Each of the band 7 roles will take a specific trust wide role in the overall financial modelling and consolidation being one of:   1. the cost improvement programme to support the monthly evidencing, reporting and consolidation of the total CIP programme  2. the annual planning process to support the Head of Business Support to ensure consistency across divisions and consolidating into a trust overarching plan to facilitate plan submission and reporting  3. the medium term financial recovery, linking into the longer term plan for northern Devon and analysing the benchmarking information available such as Model Hospital, and GIRFT |
| **PATIENT/CLIENT CARE** |
| The post holder is required to put the patient, as the first priority, at the centre of all activities although the post holder will not have contact with patients in the course of their normal duties |
| **POLICY/SERVICE DEVELOPMENT** |
| The post holder will be required to:   * Ensure that financial management policies and procedures are developed and implemented according to best practice. * Provide training, advice and support to managers throughout the Trust on Standing Financial Instructions and financial procedures. * Ensure desk top procedure notes are developed and maintained for all tasks under the post holders control. |
| **FINANCIAL/PHYSICAL RESOURCES** |
| Continuing own personal and professional development, and to actively participate in all aspects of in-house training. |
| **HUMAN RESOURCES** |
| Line management responsibilities for Band 2 to 6 Business Partnering staff within the business partnering function |
| **INFORMATION RESOURCES** |
| The post holder will need to input, store, modify, analyse, process and present complex information on a day to day basis. The post holder will develop reports based on financial information to use to inform key stakeholders of on-going developments. |
| **RESEARCH AND DEVELOPMENT** |
| The post holder will respond to requests to undertake surveys and audits relevant to own work and to work closely with the Local Counter Fraud Specialist and Internal Audit leads with regards to audits of financial information. |
| **PHYSICAL SKILLS** |
| Standard keyboard skills are required to produce reports, presentations and project plans. An advanced IT skill set is required for to support the presentation of complex information |
| **PHYSICAL EFFORT** |
| This post is predominantly desk based using VDU equipment with a frequent requirement to be seated for long periods of time.  The post requires travelling, meetings in various venues and office-based work |
| **MENTAL EFFORT** |
| This post requires frequent intense concentration for collating, analysing, interpreting and presenting complex financial data and requires responding quickly and accurately to complex emails with regards to financial data. The intense concentration may be for long periods of time.  The postholder will have the ability to think quickly and constructively and make decisions autonomously.  The postholder will be able to adapt to frequent interruptions and working in a large open plan office.  Adaptability, flexibility and ability to cope with uncertainty and change. |
| **EMOTIONAL EFFORT** |
| There will be regular exposure to conflict and challenge where the post holder will be required to deal with contentious issues.  There will be occasional exposure to distressing and emotional circumstances where the post holder may have to part unwelcome news to staff, or effectively influence and negotiate with stakeholders in difficult circumstances.  Moderate exposure to distressing or emotional circumstances, which can include dealing with patients and bereaved relatives. Where the Trust has in its possession either cash or personal effects of patients, relatives may not appreciate process that has to be followed in order to return items, which can be difficult to explain if the relative is distressed. |
| **WORKING CONDITIONS** |
| There may be occasional unpleasant conditions when dealing with potentially distressed patients and clients.  There is a requirement to use VDU equipment more or less continuously on most days. |
| **OTHER RESPONSIBILITIES** |
| Take part in regular performance appraisal.  Undertake any training required in order to maintain competency including mandatory training, e.g. Manual Handling  Contribute to and work within a safe working environment  You are expected to comply with Trust Infection Control Policies and conduct him/herself at all times in such a manner as to minimise the risk of healthcare associated infection  As an employee of the Trust, it is a contractual duty that you abide by any relevant code of professional conduct and/or practice applicable to you. A breach of this requirement may result in action being taken against you (in accordance with the Trust’s disciplinary policy) up to and including dismissal.  You must also take responsibility for your workplace health and wellbeing:   * When required, gain support from Occupational Health, Human Resources or other sources. * Familiarise yourself with the health and wellbeing support available from policies and/or Occupational Health. * Follow the Trust’s health and wellbeing vision of healthy body, healthy mind, healthy you. * Undertake a Display Screen Equipment assessment (DES) if appropriate to role. |
| **APPLICABLE TO MANAGERS ONLY** |
| Leading the team effectively and supporting their wellbeing by:   * Championing health and wellbeing. * Encouraging and support staff engagement in delivery of the service. * Encouraging staff to comment on development and delivery of the service. * Ensuring during 1:1’s / supervision with employees you always check how they are. |
| **GENERAL** |
| This is a description of the job as it is now. We periodically examine employees' job descriptions and update them to ensure that they reflect the job as it is then being performed, or to incorporate any changes being proposed. This procedure is conducted by the manager in consultation with the jobholder. You will, therefore, be expected to participate fully in such discussions. We aim to reach agreement on reasonable changes, but if agreement is not possible, we reserve the right to insist on changes to your job description after consultation with you.  Everyone within the Trust has a responsibility for, and is committed to, safeguarding and promoting the welfare of vulnerable adults, children and young people and for ensuring that they are protected from harm, ensuring that the Trusts Child Protection and Safeguarding Adult policies and procedures are promoted and adhered to by all members of staff.  At the Royal Devon, we are committed to reducing our carbon emissions and minimising the impact of healthcare on the environment, as outlined in our Green Plan available on our website. We actively promote sustainable practices and encourage colleagues to explore and implement greener ways of working within their roles. |

PERSON SPECIFICATION

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| **Job Title** | Associate Finance Business Partner |

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| **Requirements** | **Essential** | **Desirable** |
| **QUALIFICATION/ SPECIAL TRAINING**  Qualified accountant and member of an accountancy body which is a member of the Consultative Committee of Accountancy Bodies (CCAB) or equivalent experience. | YES |  |
| **KNOWLEDGE/SKILLS**  Educated to masters level or equivalent level of experience of working at a senior level in specialist area.  Extensive knowledge of specialist areas, acquired through post graduate diploma or equivalent experience or training plus further specialist knowledge or experience to master’s level equivalent.  Evidence of post qualifying and continuing professional development.  Must have an understanding of the background to and aims of current healthcare policy nationally and appreciate the implications of this on engagement.  Should have an appreciation of the relationship between the Department of Health, the Strategic Health Authority and individual provider and commissioning organisations.  If studying or qualified, a member of relevant professional body. | YES  YES | YES  YES  YES  YES |
| **EXPERIENCE**  Experience in working in planning and reporting across multiple complex functions  Experience of leading a team working across a complex environment  Previously responsible for a budget, involved in budget setting and working knowledge of financial processes | YES | YES  YES |
| **PERSONAL ATTRIBUTES**  **Communication**  Ability to provide and receive highly complex, sensitive and contentious information, negotiate with senior stakeholders on difficult and controversial issues, and present complex and sensitive information to large and influential groups.  Persuade board and senior managers of the respective merits of different options, innovation and new market opportunities.  Negotiate on difficult and very complex and detailed issues.  **Analytical**  Problem solving skills and ability to respond to sudden unexpected demands.    Ability to analyse complex facts and situations and develop a range of options.  Takes decisions on difficult and contentious issues where there may be a number of courses of action.  Strategic thinking – ability to anticipate and resolve problems before they arise.  Ability to carry out procurements for highly detailed, high value contracts that require analysis, comparison and assessment.  **Planning**  Plans and organises a broad range of complex activities, formulating and adjusting plans to reflect changing circumstances.  Inputs to strategic plans across NHS and within the specific teams.    Works with Stakeholders to develop performance improvement plans and to develop plans for innovation and opening up the market.  Good use of available information sources to enable efficient and effective planning.  Ability to work under pressure and to tight and often changing deadlines  **Management**  Ability to inspire teams  Skills for direct line management and job management.  Skills for delivering results through managing through others and using a range of levers in the absence of direct line management responsibility.  Skills for managing relationships with a range of different stakeholders.  **Autonomy**  Manages team within the constraints of NHS strategic plan.  Ability to work on own initiative and organise workload, allocating work as necessary.    Ability to make decisions autonomously, when required, on difficult issues  **Other**  An ability to maintain confidentiality and trust.  Used to working in a busy environment.  Adaptability, flexibility and ability to cope with uncertainty and change.  Commitment to continuing professional development | All essential requirements to be tested at application and interview |  |
| **OTHER REQUIREMENTS**  The post holder must demonstrate a positive commitment to uphold diversity and equality policies approved by the Trust.  Ability to travel to other locations as required | YES  YES |  |

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|  | | **FREQUENCY**  **(Rare/ Occasional/ Moderate/ Frequent)** | | | |
| **WORKING CONDITIONS/HAZARDS** | | **R** | **O** | **M** | **F** |
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| **Hazards/ Risks requiring Immunisation Screening** | |  |  |  |  |
| Laboratory specimens | N |  |  |  |  |
| Contact with patients | N |  |  |  |  |
| Exposure Prone Procedures | N |  |  |  |  |
| Blood/body fluids | N |  |  |  |  |
| Laboratory specimens | N |  |  |  |  |
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| **Hazard/Risks requiring Respiratory Health Surveillance** |  |  |  |  |  |
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| Solvents (e.g. toluene, xylene, white spirit, acetone, formaldehyde and ethyl acetate) | N |  |  |  |  |
| Respiratory sensitisers (e.g isocyanates) | N |  |  |  |  |
| Chlorine based cleaning solutions  (e.g. Chlorclean, Actichlor, Tristel) | N |  |  |  |  |
| Animals | N |  |  |  |  |
| Cytotoxic drugs | N |  |  |  |  |
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| **Risks requiring Other Health Surveillance** | |  |  |  |  |
| Radiation (>6mSv) | N |  |  |  |  |
| Laser (Class 3R, 3B, 4) | N |  |  |  |  |
| Dusty environment (>4mg/m3) | N |  |  |  |  |
| Noise (over 80dBA) | N |  |  |  |  |
| Hand held vibration tools (=>2.5 m/s2) | N |  |  |  |  |
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| **Other General Hazards/ Risks** | |  |  |  |  |
| VDU use ( > 1 hour daily) | Y |  |  |  | Y |
| Heavy manual handling (>10kg) | N |  |  |  |  |
| Driving | Y |  | Y |  |  |
| Food handling | N |  |  |  |  |
| Night working | N |  |  |  |  |
| Electrical work | N |  |  |  |  |
| Physical Effort | N |  |  |  |  |
| Mental Effort | Y |  |  |  | Y |
| Emotional Effort | Y |  | Y |  |  |
| Working in isolation | Y |  |  | Y |  |
| Challenging behaviour | Y | Y |  |  |  |