

CAJE REFERENCE **HD2018/0106**

DATE APPROVED **14/09/2018**
Reviewed **26/10/2021**

JOB DESCRIPTION

JOB DETAILS

Job Title: Finance Business Partner

Pay Band: 8a

Directorate: Finance

Department: Finance

ORGANISATIONAL ARRANGEMENTS

Managerial Accountable to: Senior Finance Business Partner

Reports to: Senior Finance Business Partner

Professionally Responsible to: Senior Finance Business Partner

Responsible For: These roles support the Senior Finance Business Partners to provide strong strategic high quality financial management business support and customer focused financial support for the Health Board's divisions. Each Business Partner will work within a team comprising of a team of Band 7 Assistant Business Partners as nominated lead roles for particular areas. Supporting staff at bands 5 and below complete each team.

JOB SUMMARY / PURPOSE

The Health Board employs over 10,000 staff and has a budget of around £0.8 billion. We are responsible for the operation of four district general hospitals other acute and community hospitals, and a network of health centres, clinics, community health team bases and mental health units. In addition it also coordinates the work of GP practices and NHS services provided by dentists, opticians and pharmacies.

The post will report to the Senior Finance Business Partner and will support the day to day co-ordination and provision of all financial support functions to the Health Board in relation to the activity of their division(s). They may be required to deputise for the Senior Finance Business Partner and when required.

The post holder is expected to contribute strategic financial advice to support the delivery and development of patient care and services throughout their assigned division. The post holder will ensure efficiency, effectiveness, integrity and business focus of financial systems and processes within the division.

The role of a business partner in the context of this Health Board is to be focused on:

- Forward thinking: ensuring that financial forecasts and modelling are developed and embedded in the way we work, and that effective risk management arrangements are embedded;
- Financial monitoring: resource use, including variances from budget, long term trends and projections;
- Options and decisions: Supporting policy decisions and business cases with evidence-based financial information.
- Financial intelligence: ensuring that value, is an integral part of our arrangements;
- Financial governance: ensuring that arrangements are fit for purpose;
- Whole-system: Financial consequences are considered across the organisation and within divisions;
- Advice: Divisions are provided with sound, commercial advice.

The post holder will also support the Senior Finance Business Partner in the efficient and effective operational management, organisation, motivation and performance of the Finance Team for the division, aligning resources with priorities on a regular basis to ensure that the key priorities are delivered on time, and with the maximum focus of finance staff resource into value-added activities.

Will work alongside the divisional management in business and performance management, actively contributing to performance review and highlighting early any financial issues which need to be addressed. Responsible for ensuring efficiency of decisions to meet Health Board objectives.

Supporting the implementation of national and local financial policies and procedures; proposing changes where required and interpreting the policy for local implementation. Uses influence within the division to ensure others follow financial policies and procedures, escalating issues where appropriate.

Supports the development and implementation of effective financial policies and procedures to ensure the Health Board remains financially viable, minimises financial risk and maximises use of resources.

Provides assurance that the division's financial activities and systems are in line with corporate policies and procedures and meet the highest standards of stewardship and probity to comply with corporate governance requirements.

Management and provision of professional financial support, advice and information to enable managers and leaders to effectively and proactively manage their respective budgets and finances to ensure the achievement of financial targets, thereby contributing to the Health Board's statutory financial duties.

Ensure the effective operation of processes relating to the negotiation and performance management of Clinical and Non-Clinical Service Level Agreements. Responsible for the performance monitoring and delivery of high quality reporting of Clinical Activity information for the purposes of contracting, commissioning, planning and general management within the division.

Contributing to the positive culture, governance and control arrangements of the Department providing general site supervision as required.

Managing staff within their team, and advises and assists the Assistant Directors of Finance and Senior Finance Business Partners in the development of accounting, budgeting and reporting systems, strategies and plans.

Supporting the Assistant Director of Finance and Senior Finance Business Partners in determining the Health Board's medium term Financial Strategy (for elements of their division) and responsible for the production of resultant Financial Plans, including the three-year plan and longer term plans, through in-year monitoring and efficient board and other reporting. Provide key support to the achievement of all financial targets.

MAIN DUTIES AND RESPONSIBILITIES

Divisional Finance Duties

Supporting the co-ordination, monitoring and review of Finance activities, to optimise use of resources, ensuring the activities of the division are completed to a high professional standard and agreed deadlines that will enable the Health Board to meet its statutory financial and other reporting deadlines.

Responsible for ensuring there is sufficient resource to implement financial and accounting policies and procedures. Making arrangements that these are held and understood by appropriate members of staff, in order to maintain an environment that promotes optimum standards of professionalism and financial control.

Supporting the achievement of all financial targets by ensuring an appropriate performance management framework is in place, identifying and reporting relevant issues and projected variances and advising on potential corrective courses of action. Ensuring that reporting is based on future trends and projections based on sound evidence rather than focused on backward-looking reporting.

Ensuring that the developments within the value agenda are fully developed and explored within the division, maximising the opportunities to improve value within the division and across the system.

Support the divisional leadership team and other senior managers in the delivery of new and innovative projects to deliver business cases and financial sustainability plans. Lead in conducting financial service reviews and ensuring that all plans meet the service and patient requirements.

Working with senior medical clinicians in the development of new and existing services and having presence and authority to drive through changes taking staff with them.

Support the provision of professional financial advice, support and information for the activities of the Division, which is in line with the Health Board's strategy. To develop detailed financial projections, option appraisals and forward plans to enable potential issues to be anticipated and resolved, in order to achieve the Division's financial targets and the Health Board's statutory financial duties.

Communicate and interpret complex, sophisticated and often conflicting, technical contentious financial and non financial information in an easily understood manner with Divisional leadership team, managers and staff. This may require a process of negotiation, influence and persuasion.

Ensure appropriate finance training is available and delivered to the division's non-finance managers and clinical staff and that relevant finance processes are embedded into the Health Board's overall management processes and performance management framework.

With the Senior Finance Business Partner, ensure that there is appropriate financial information and expert advice to enable the Health Board to meet its statutory obligations and satisfy all reporting requirements including the Health Board's Annual Accounts and NHS monitoring returns.

Works autonomously to interpret, implement and communicate national finance policies and their implications as appropriate to the post-holders responsibilities.

Financial Planning and Financial Management

Support the Senior Finance Business Partner in the determination of Health Board financial strategies. Translate these strategies into relevant finance business plans including, but not limited to:

- Overseeing the divisional Revenue Budget setting process and production of resulting Budget Setting papers for submission to the Health Board.
- Supporting the completion of Health Board Annual and 3-year Financial Plans, for Board approval or external submission as appropriate.

To work alongside the Assistant Director of Finance, Senior Finance Business Partner and other senior financial managers to recognise the multiplicity of the Health Board's targets and objectives and to make judgements regarding the allocation of finances having due regard to financial risk and where other leading opinions may conflict.

Ensure an appropriate framework for developing and producing monthly finance reports, including but not limited to:

- Management Information Packs

- Board returns
- Service Line Reports
- Lead a process ensuring financial assumptions and projections are appropriately challenged before being submitted to the Assistant Director of Finance.
- Highlight adverse performance and key risks where appropriate and provide expert advice on options for corrective action.

To prepare financial information and sound professional briefing material for use by Divisional leadership, the Senior Finance Business Partner, Assistant Director of Finance and other Senior non-finance managers on the performance management of the Division.

Co-ordinate the development and maintenance of the Division's cost reduction plans and monitor savings achieved against the annual plan together with the development and maintenance of a rolling savings plan to support long term financial planning.

Ensure the integrity of the Division's finance and reporting systems and control processes. In particular, ensuring that finance outputs are timely, accurate and fit for purpose.

Responsible for analysing and reviewing the Division's cost base, using benchmarking and other tools, and pro-actively seeking cost reduction opportunities and other avenues to identify and deliver efficiencies.

Ensure the financial planning processes are embedded within the service and capacity planning process led by the Divisional leadership team, and develop an improved capability to model the impact of service performance improvements and changes in activity volumes on future income and expenditure.

Financial and Technical Services

To support a robust financial control service to the Division, ensuring that key controls are fully operational within the function; compliance with HMRC regulations; compliance with legal and statutory requirements; standing orders; standing financial instructions; schemes of delegation and any other Health Board policy, as well as professional accounting standards.

To provide advice in relation to Accounting Standards, Welsh Government Accounting requirements or HMRC regulations and NHS Superannuation to Divisional Leadership teams.

To support on the provision of a robust training programme for the Division's Finance Team, and for non-finance managers and leaders within the Division Team.

Using research and analytical skills as required.

Ensure that the Financial Services offered to the Division are robust and fit for purpose. This will include working with the Assistant Directors of Finance to ensure that the services provided by NHS Wales Shared Services Partnership are fit for purpose.

Procurement

Support the embedding, through the Head of Procurement at NWSSP, a strategic framework for policies, practices and procedures to secure the effective provision of Procurement services across designated region.

General

Responsible for the development and update of information systems to meet requirements of the Division and Health Board, using computerised systems where appropriate.

Ensure continuous improvement in all aspects of the role by regular review of work practices and procedures, and initiate and implement service changes where appropriate to ensure systems operate efficiently and effectively.

Develop high standards of stewardship and probity within the Division to ensure corporate governance requirements are achieved.

Support the provision of clear leadership of the Division Finance Team in a proactive, open and supportive manner, motivating, training and developing all staff. To manage the team, which will include recruitment, appraisal and disciplinary arrangements.

Contributes to establishing and maintaining a positive and supportive culture within the organisation and the Finance Department.

Promotes the governance and control arrangements of the organisation providing general site supervision within the Finance Department as required.

Promotes the development and maintenance of high professional standards in providing financial advice, and producing reports and correspondence across the remit of the post and in supervising others.

Any other duties as directed by the Director of Finance, Deputy Director of Finance or the Assistant Directors of Finance.

Communication

This role requires excellent communication, influencing and negotiating skills, as well as a high degree of personal integrity, resilience, tenacity and professional standing.

The post holder is required to develop and maintain positive working relationships with finance, planning, performance and operational staff within the organisation and with finance professionals in other organisations. These communications will involve the sharing and explaining complex financial projections.

Personal and People Development and People Management

Line manage and be responsible for ensuring an effective system of performance management, including PADR for all direct reports and their staff.

Ensure all direct reports are aware of their managerial responsibilities for employment issues within their area of responsibility.

Work with colleagues to ensure that robust employment policies and processes are in place for all areas of responsibility.

Prepare for and take an active part in the PADR process in accordance with organisation policy in partnership with reviewer, identifies opportunities to develop own competence/own skills in order to achieve objectives.

Provide appropriate support to others to improve their knowledge and understanding and shares own knowledge, skills and experience with others during induction and training sessions for staff.

Information Processing

Post holders are expected to manage the operation of, and maintain systems as are required for the effective running of the Finance function.

These include, but are not limited to:

- General Ledger
- Procure to Pay
- Accounts receivable
- Interfaces with Payroll
- Budgeting and Forecasting
- Reporting
- Costing

Health, Safety and Security

Post holders will ensure that for their teams, there are in place appropriate arrangements for the Health, safety and security of our staff and facilities.

Post holders will ensure mandatory training requirements are complied with.

Post holders are expected to establish an open and learning work environment where staff feel able to bring to attention of management issues requiring action.

Quality

Post holders will deliver financial support with the aim of maintaining quality health services consequent with the financial environment. In so doing, they will be expected to deliver quality financial services and establish KPIs and feedback mechanisms to ensure quality is monitored and maintained.

Through robust performance management, ensures that ambitious targets are set; ensures processes are in place to hold individuals to account; and successfully holds individuals to account. Is prepared to be held openly to account for meeting goals and targets.

Use evidence, research and proven methods to underpin plans that improve the quality and experience of the finance service. This will include undertaking ongoing reviews, audits and testing of current services with a view to adopting emerging best practice.

Equality and Diversity

Post holders must deliver our services in such a way as to be non-discriminatory and encourage diversity in the workplace.

Effort and Environmental

Post holders will be capable of significant and long lasting concentration.

Possess strong numerical reasoning and logical skills.

Demonstrate the ability to impart unwelcome news to budget holders and others about performance targets

Daily use of VDU for extended periods.

PERSON SPECIFICATION

ATTRIBUTES	ESSENTIAL	DESIRABLE	METHOD OF ASSESSMENT
Qualifications and Knowledge	<p>CCAB Qualified Accountant – professional accountancy qualification plus further specialist knowledge training and experience. Membership of a professional Chartered Accounting institution.</p> <p>Evidence of Continuous Professional Development.</p> <p>Knowledge and understanding of improvement methodologies used across organisations.</p>	<p>Understanding of developing best practice in the NHS within the UK nations; and of management and leadership best practice developments.</p> <p>Keeps self-informed through local and national networks.</p>	Application form
Experience	<p>Experience in a complex organisation.</p> <p>Experience of working with Managers and Clinical Leads.</p> <p>Experience in developing business cases.</p> <p>Experience of successfully managing budgets.</p> <p>Experience in delivering successfully managing budgets.</p> <p>Experience in delivering within challenging financial situations, including financial turnaround.</p> <p>Demonstrable track record of career advancement and achievement.</p> <p>Experience of communicating, in writing and verbally, within a highly politically sensitive environment.</p>		Application form and interview.

	Commercially astute, able to manage the day to day business challenges while not losing sight of long term strategic goals.		
Language Skills		Welsh Speaker (Level 1) <i>Full details around the expectations associated with level 1 may be found at the bottom of this page</i>	Application form and Interview
Aptitude and Abilities	<p>The post holder will be responsible for embedding a culture focussed upon the patient and customer experience through quality service delivery.</p> <p>Influencing, negotiating and motivating skills.</p> <p>Experience of engaging effectively in dialogue, debate and negotiation with individuals at all levels.</p> <p>Deals innovatively with problems and challenges, encouraging others to think in novel ways to tackle issues.</p> <p>The ability to assimilate often conflicting information and an ability to discuss and debate often conflicting information and an ability to discuss debate and decide on its impact and influence on strategy.</p> <p>Provide expert, visible and professional leadership to the finance team</p> <p>Provide expert professional advice, support, challenge, scrutiny and decision making as required within finance.</p>		Interview

	<p>Able to present relevant information in a concise and persuasive format.</p> <p>Expert level numeracy, numerical reasoning and numerical analysis skills.</p> <p>Ability to consider the wider picture including future scenario planning.</p> <p>Ability to use Spreadsheets (Excel), Word-processing (Microsoft Word), Database (Access) and E-mail to a good level.</p> <p>Analyse complex situations and sensitive data and compile reports in the context of frequent daily interruptions.</p> <p>Inspires others and leads by example. Able to make calm rational decisions in the face of adversity.</p> <p>Demonstrable commitment to, and focus on, quality, promoting high standards to consistently improve patient outcomes</p> <p>Values diversity and difference, operating with integrity and openness.</p> <p>Personal credibility, with the ability to quickly gain the confidence of others, including Clinicians, Managers and staff, and build positive and constructive relationships both internally and externally.</p> <p>High level of organisation, self-motivation and flexibility in</p>		
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	<p>approach and attitude.</p> <p>Exemplary personal standards of conduct and behaviour.</p> <p>Open, honest and fair.</p> <p>Places a premium on listening and encouraging feedback.</p> <p>Treats colleagues with dignity and respect.</p>		
Values	<p>Ability to embrace the following personal values and behaviours on a daily basis -</p> <ul style="list-style-type: none"> • Dignity, Respect and Fairness • Integrity, Openness and Honesty • Caring, Kindness and Compassion <p>Ability to demonstrate a commitment to our organisational values -</p> <ul style="list-style-type: none"> • Working together to be the best we can be • Striving to develop and deliver excellent services • Putting people at the heart of everything we do 		
Other	<p>Able to travel across Wales and other areas of the UK where necessary in a timely manner.</p> <p>Flexible approach to working, based on the needs of the service.</p>		

GENERIC STATEMENTS

NHS CODE OF CONDUCT FOR MANAGERS

The post holder will be expected to adhere to the standards laid down in the NHS Code of Conduct for Managers and at all times act in a manner that reflects and promotes the values of the HB. The post holder must ensure all activity and service objectives are effectively met in compliance with HBs standing orders and SFIs, scheme of delegated authority and employment legislation.

COMPETENCE

The post holder is required to participate in the Hywel Dda PDR process and work towards meeting identified development needs. The postholder is required to demonstrate ongoing continuous professional development. At no time should the postholder work outside their defined level of competence. If the postholder has concerns regarding this they should immediately discuss this with their Manager/Supervisor/Consultant. The postholder has the responsibility to inform those supervising their duties if they are not competent to perform a duty.

TEAM BRIEF

The post holder is required to actively participate in Hywel Dda Team Briefing in order to aid communication within the Health Board. Managers and supervisors will regularly deliver the Team Brief verbally to their own staff teams by means of a Core Brief and additional departmental information.

RISK MANAGEMENT/HEALTH & SAFETY

The postholder has a responsibility to themselves and others in relation to managing risk, health and safety and will be required to work within the policies and procedures laid down by the Hywel Dda. All staff have a responsibility to access occupational health, other staff support services and/or any relevant others in times of need and advice. The postholder has the responsibility for monitoring the progress on action plans in relation to risk, health and safety. The postholder has the responsibility for the development of risk profiles and a risk register within their area of responsibility. The postholder has the responsibility for developing systems to monitor performance against agreed performance indicators.

HARRASSMENT & BULLYING

The HB condemns all forms of harassment and bullying and is actively seeking to promote a workplace where employees are treated with dignity, respect and without bias. All staff is requested to report any form of harassment and bullying to their line manager or to any Director of the HB.

RECORDS MANAGEMENT

The postholder has the responsibility for timely and accurate record keeping and where appropriate in accordance with professional guidelines. The postholder has the responsibility for the creation and maintenance of records in accordance with Hywel Dda policy and the data protection act.

FLEXIBILITY STATEMENT

The developing and rapidly changing nature of the organisation will require considerable flexibility from the post holder. This job description indicates the main functions and responsibilities for the post and is not intended to be a fully inclusive list and the duties and responsibilities specified in this job description are subject to change as the needs of the

HB evolve. On agreement with the post holder, this job description will be amended, as necessary, in the event of future organisational and professional changes and/or personal development.

CONFIDENTIALITY

All staff may have access to confidential information about patients, staff or health service business. On no account must such information be divulged to anyone who is not authorised to receive it. Confidentiality of information must be preserved at all times whether at or away from work. Any breach of such confidentiality is considered a serious disciplinary offence, which is liable to dismissal and /or prosecution under current statutory legislation (Data Protection Act) and the HB Disciplinary Policy.

EQUAL OPPORTUNITIES

Hywel Dda University Health Board is committed to ensuring that, as far as is reasonably practicable, the way we provide services to the public and the way we treat our staff, patients and others reflects their individual needs and that individuals or groups will not face discrimination, harassment or victimisation, or be treated less favourably on the basis of sex, pregnancy and maternity, gender reassignment, disability, race, age, sexual orientation, religion and belief, family circumstances including marriage and civil partnership. To this end, the UHB has an Equality and Diversity Policy and Equality Impact Assessment Policy and Procedure and it is for each employee to contribute to enacting these policies.

OUTSIDE EMPLOYMENT/OUTSIDE INTERESTS

Any other work or outside interests must not conflict with the duties and responsibilities of your attendance for work as an employee of the HB.

ENVIRONMENTAL

The Hywel Dda Health Board is committed to its environmental responsibilities. The Board recognizes that its activities, including energy consumption, waste generation, transportation emissions, water use and resource consumption, have a significant impact on the environment. As an integral part of its commitment to ensure high quality patient care, all staff have a responsibility to adhere to environmental policy and procedure at both an organisational level and within their own area of work to ensure legal compliance. Staff will do their utmost to minimize the environmental impacts of Health Board activities and services, and seek to continually improve operations to minimize their environmental effects. Staff should take note of relevant communications and attend mandatory training when required.

SMOKE FREE POLICY

All Health Board sites and premises and grounds are designated as smoke free areas. This policy applies to all staff, contractors/service providers, patients*, visitors and the public.

***Those patients staying in residential mental health units will be exempt under the Smoke-Free Premises (etc) Wales Regulations 2007.**

SAFEGUARDING ADULTS AND CHILDREN

Every employee of the Health Board, whatever their job, role, profession, status or place of work, paid or voluntary, has a responsibility for Safeguarding both adults and children. Staff must:

- Understand the nature of abuse and how children and adults might be at risk of harm and neglect.
- Understand their own safeguarding responsibilities and what actions they may need to take.
- Know where they can access local policies and procedures in relation to Safeguarding Children and Safeguarding Adults.
- Report allegations or suspicions of abuse to their line manager, including suspicions about a colleague or manager, irrespective of their status, profession or authority. This includes whistle-blowing
- Know how to make a Safeguarding referral to Social Services and/or the Police for both adults and children to report allegations or if they have concerns.
- Know what services, advice and support are available locally to vulnerable children and adults and how to access help needed.

INFECTION CONTROL

"The document Commitment to Purpose: Eliminating Preventable Healthcare Associated Infection: A Framework of actions for healthcare organisations in Wales stipulates that all staff must understand their responsibility and accountability for Infection Prevention & Control and the Health Board must be assured of this on an ongoing basis". IP&C is the personal and individual responsibility of all Health Board staff. All staff have a responsibility to protect and safeguard patients, service users, visitors and employees against the risk of acquiring healthcare associated infections. This responsibility includes being aware of the content of and consistently observing, Health Board Infection Prevention & Control Policies and procedures; and best practice guidance in order to maintain high standards of Infection Prevention & control.

GENERAL

The post-holder needs to ensure they are familiar with their terms and conditions of service.