

## NHS England



### Job description and person specification

March 2024

Position			
Job title	Head of Locality Finance – North East & North Cumbria	Directorate/ Region	North East and Yorkshire Region
Pay band	AFC Band 8c	Responsible to	Deputy Director of Operational Finance – NENC/HNY
Salary	£70, 417 - £81,138	Accountable to	Director of Operational Finance
Tenure	Substantive Position	Responsible for	Directly manages specified support posts
Funding Arrangements	Admin Funded	Base	The Old Telephone Exchange, Darlington DL3 7DR or Stella House, Newcastle NE15 8NY
Our Organisation		NHS England Values and Behaviours	



NHS England leads the NHS in England to deliver high quality care for all. We support NHS organisations to deliver better outcomes for our patients and communities, work to get the best possible value for taxpayers, and drive improvement across the NHS.

Through our [seven regional teams](#), NHS England supports local [integrated care systems](#), made up of public services that provide health and care – NHS organisations, primary care professionals, local councils, social care providers and the community, voluntary and social enterprise sector – to improve the health of the population, improve the quality of care, tackle inequalities and deliver care more efficiently.

From April 2023, NHS England, Health Education England and NHS Digital became one single organisation, putting workforce, data, digital and technology at the heart of our plans to transform the NHS.

Having listened to our staff over the last year, we aim to create a healthy and high performing organisation, underpinned by the NHS Constitution values:

- Respect and dignity.
- Commitment to the quality of care.
- Compassion
- Improving lives.
- Working together for patients.
- Everyone counts.

Our people all have a part to play in helping to shape and develop our culture and in embedding and living these values.

Our behaviors:

- Leading by example:
- We prioritise patients in every decision we take.
- We listen and learn.
- We are evidence-based.
- We are open and transparent.
- We are inclusive.
- We strive for improvement



Service and team	About the role
<p>The North East and Yorkshire region Finance Directorate is a high performing team, flexible in approach and adaptable to change and a key function within the regional structure.</p> <p>It oversees the financial performance of the region by ensuring systems and processes are in place across organisations, systems and the region which:</p> <ul style="list-style-type: none"> <li>• Support development and delivery of revenue and capital plans that meet national and statutory requirements</li> <li>• Enable sound financial control, optimal efficiency, risk management and mitigation</li> <li>• Manage and actively promoting system working to ensure best value for money</li> <li>• Provide necessary advice, support and challenge to organisations and systems</li> <li>• Work with systems and organisations to develop sustainable financial strategies</li> <li>• Support and manage specific projects that will have national and local impact and engagement</li> </ul> <p>The post holder will operate within the team led by the Director of Operational Finance and manage specified support staff within that team.</p>	<p>The Head of Locality Finance will work as part of a dynamic team in delivering an effective service supporting managers and staff across the patch.</p> <p>The postholder will be the key finance relationship manager for the Locality/System for which they are responsible, escalating where appropriate and operating in line with the Memorandum of Understanding agreed between the system and NHSE England to ensure delivery of the system financial position in line with financial targets and requirements.</p> <p>This will be achieved through effective support to Integrated Care Boards (ICBs) and NHS Providers, alongside supporting the delivery of wider Integrated Care System (ICS) financial plans.</p> <p>The post holder will be a key member of the wider regional Finance team and will be expected to contribute and lead on regional initiatives.</p> <p>The post holder will:</p> <ul style="list-style-type: none"> <li>• Support the development and delivery of a coherent and credible system financial strategy and annual financial plans for the locality/system</li> <li>• Ensure NHS England financial strategy and technical guidance is understood by all stakeholders and is delivered utilising all available resources efficiently and effectively.</li> <li>• Ensure appropriate systems and processes are in place to provide timely reporting and briefings.</li> <li>• Proactively understand and support the management of key risks and issues associated with delivery of financial plans and performance, ensuring appropriate actions are taken to mitigate or respond to risks.</li> </ul>



- Supporting the performance management and improvement processes of organisations and systems informed by efficiency opportunities and available benchmark data
- Provide day to day management of the locality finance team posts, ensuring that the finance team engage in continuous professional development and are fully equipped to support organisations in navigating NHS England national processes (for example Transaction, Service Reconfiguration, planning, capital and cash assurance processes).
- Manage effective interactions across the wider regional finance team to support effective discharge of all NHSE finance functions and responsibilities
- Manage and actively promote effective relationships with key stakeholders and other departments both internally and externally, with particular reference to stakeholders within the locality/system for which they have responsibility.
- Be required to be mobile within the Locality and wider region, and work productively to manage the demands of the role.
- Deputise for the Deputy Director of Finance as required
- Any other tasks as appropriate for the role

The postholder must be a qualified accountant and full CCAB or CIMA member. They should be able to demonstrate experience of working at a senior level in large complex organisations, and have an understanding of NHS finance.

The post holder will lead the provision of an efficient, effective and high quality professional and well co-ordinated finance support service capable of meeting all statutory, regulatory and NHS requirements ensuring alignment with the activity of the organisation.

The post holder will be responsible for:



	<ul style="list-style-type: none"> <li>• Managing the team's business support function, including developing and managing the team's annual business plan, progress and dashboard reporting and risk and issue management.</li> <li>• Manage all necessary business returns, including planning and workforce returns.</li> <li>• Develop and implement systems to ensure information is properly managed and best practice is shared across the team, Directorate and the wider NHS organisations as appropriate.</li> <li>• Take a lead in the coordination of training and development and recruitment activity across the Department or Directorate.</li> <li>• Oversight and management of all aspects of the Department or Directorate budgets.</li> </ul>
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Key Job specifics and responsibilities	Key accountabilities
<p>To work collaboratively across the NHS England matrix, including integrating the National Director's portfolio.</p> <p><b>Improving quality and outcomes</b></p> <ul style="list-style-type: none"> <li>Demonstrable commitment to and focus on quality, promoting high standards to consistently improve patient outcomes</li> </ul> <p><b>Enabling patient and public involvement</b></p> <ul style="list-style-type: none"> <li>To act as a champion for patients and their interests and involve the public and patients in the policy development and decision-making of NHS England.</li> <li>To ensure all public and patient contact with the office is of the highest professional standard.</li> <li>To embed patient and public involvement within NHS England at all levels of decision making.</li> </ul> <p><b>Promoting equality and reducing inequalities</b></p> <ul style="list-style-type: none"> <li>To uphold organisational policies and principles on the promotion of equality.</li> <li>To create an inclusive working environment where diversity where diversity is valued, everyone can contribute, and everyday action ensure we meet our duty to uphold and promote equality.</li> </ul>	<p><b>Operational requirements</b></p> <ul style="list-style-type: none"> <li>Working within the overall strategic objectives, devise, implement and monitor the strategy. Evaluate, interpret and locally implement best practice.</li> <li>Provide overall management to the whole function(s).</li> <li>Develop and implement qualitative and quantitative measures to determine performance against the organisational strategy. Report progress against the strategy through personal representation at senior management forums and by written reports. Tailoring delivery to meet the needs of the audience.</li> <li>Ensure that best practice is developed and delivered at organisational and departmental levels. Challenge ways of working and persuade, motivate and influence other senior managers to realign their practice where necessary.</li> <li>Ensure that appropriate strategies are employed in line with business objectives and that these are fully cascaded.</li> <li>Personally lead, support and contribute to formal negotiations with senior level internal and external stakeholders, providing a high level of negotiating expertise to secure the most advantageous arrangements.</li> <li>Advise on innovative opportunities and support all departments in their strategies and programmes to maximise service benefits.</li> <li>Oversee the tracking of progress against plans and transition milestones, ensuring appropriate processes are in place to flag issues, risks and concerns with the relevant stakeholders.</li> <li>Ensure the securing of value for money, assuring relevant factors such as quality and governance.</li> </ul>



### Partnership and cross boundary working

- Support the development of organisations towards Integrated Care Systems or other forms of devolution and support partners in ensuring that the financial performance arrangements are sufficiently flexible to enable changes in approach as organisations mature.

### Leadership for transformational change

- To model a collaborative and influencing style of working, negotiating with others to achieve the best outcomes. Embedding this approach across the Directorate.

### Using insight and evidence for improvement

- To demonstrate commitment and focus on quality, promoting high standards to consistently improve patient outcomes

### Developing an excellent organisation

- To ensure the health, safety and wellbeing of all staff within the department.
- To ensure compliance with all confidentiality and governance requirements within the department.

- To monitor, interpret and quality assure progress against deliverables. Quality assurance and progress of deliverables to the NHSCB that often require adjustments specifically in relation to the complex corporate business agenda, strategic objectives and the business planning process
- To develop business plans and provide expert strategic and policy advice and guidance on all areas of the National Director's portfolio.
- Devise, manage and update policies and procedures, ensuring the adoption of best practice methodology, rules, standards and thresholds.
- Supports the creation and locally implements the operational strategy and business plan, clearly identifying links to national, regional and local priorities and policy objectives.
- Contributes to the development and implementation of general policy and service development.
- Develops and implements strategies for improving performance and processes, ensuring stakeholders representation.
- Drives and leads development and improvement of processes.
- Drives process efficiency in the continuous development of the end-to-end cycle and its associated performance metrics.
- Accountable for short, medium and long-term strategic business plans, achieving quality outcomes.
- Responsible for linking people, resource and strategy to organisational strategy.

### Financial and Physical Resources

- Budgetary responsibility for a function(s) and the services provided within that function. Evaluating value for money of new contracts, monitoring the performance of existing providers and ensuring that



provider performance aligns, and comply, with contractual terms and condition.

- Constantly strive for value for money and greater efficiency in the use of these budgets and to ensure that they operate in recurrent financial balance year on year, in a way that is compliant with Standing Orders and standing Financial Instruction.

### People Management

- Support and line manage the Department or Function, building a collaborative working environment and an innovative culture.
- Support an effective matrix approach to achieve NHS objectives, where appropriate across the NHS England.
- To manage, motivate, inspire and develop staff within the team to ensure that they are able to deliver the employee relations cases responsibilities of NHS England.
- Responsible for the recruitment and development of the Directorate staff, including undertaking appraisal, ensuring team and individual development and where appropriate progression of employee relations matters.

### Information Management.

- Responsible for devising, developing and implementing appropriate information sharing systems.
- Lead the creation, maintenance and review implementation, of information systems for collecting, evaluating and interpreting complex data. To inform short and medium and long term strategies.
- Developing and presenting reports, summarising status on issues, appraising outcomes, providing progress reports for senior staff or



groups of staff as directed from time to time, tailoring content to meet the needs of the audience.

### Research and Development

- Ensures the team are able to access best practice and current information within specialism, drawing from experience and expertise in other fields and industries, ensuring the organisation and other stakeholder organisations, benefit from relevant innovations.
- Commissions Research and Development initiatives to secure cost and service improvements from alternative methods of operation, through new goods and services or re-engineering existing processes.

### Policy and Service Development

- To identify and assess opportunities for new services and threats to existing services and market developments.
- Develop plans and seize opportunities, mitigate threats and deliver strategic objectives. Within own function making recommendations for service delivery.
- Responsible for proposing and drafting changes, implementation and interpretation to policies, guidelines and service level agreements (SLA's) which may impact service delivery and Sector.
- Maintain a good knowledge of emerging policies from government departments, to assist in the thinking and definition of strategy discussions.

### Key Working Relationships

- Regular contact with internal and external stakeholders, sensitive, complex, contentious and confidential issues.

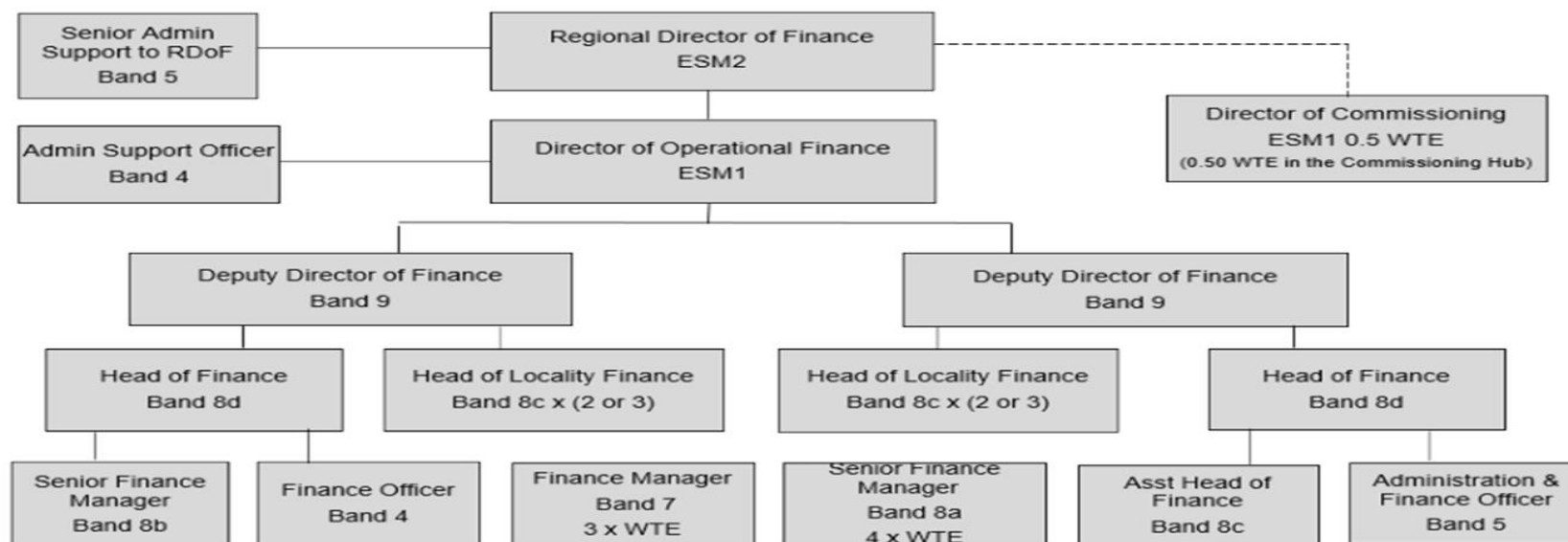


- Participate in relevant internal and external working groups/projects, services and initiatives to provide project, information and analytical advice and expertise.
- Overseeing the team to develop and implement processes and systems that align to strategy.
- Present verbal, written and numerical information and issues, explaining complexities, to a wide range of internal and external stakeholders.
- To liaise with other Managers to share best practice.



## Organisational Structure

### Finance Directorate Structure



#### Line Management and Portfolios

Each Band 9 will be responsible for two ICBs, aligned to the two System Coordination roles in COO/Performance Directorate. Two HoLF Band 8c posts will report to one B9, three to the other B9. Each B7 and B8a post will have a designated B8c or B8d line manager.



Person specification				
Criteria		Essential	Desirable	Evidence*
<b>Qualifications</b>	The postholder must be a qualified accountant and full CCAB or CIMA member.	√		A/C
	Educated to masters level or equivalent level of experience of working at a senior level in specialist area.	√		A
<b>Knowledge and experience</b>	Demonstrate significant experience of working in senior financial role within large complex organisation(s)	√		A/I
	Evidence of post qualifying and continuing professional development	√		
	Demonstrable senior management experience in a multi-disciplinary environment	√		
	Understanding of the background to and aims of current healthcare policy and appreciate the implications of this on engagement and delivery	√		
	Experience of delivering against competing priorities and deadlines while also directing the work of teams/individuals.	√		
	Experience of budgetary responsible, including budget setting with evidence of working knowledge of financial processes	√		
	Management of staff/ functions	√		
	Experience and significant knowledge of the NHS Financial regime		√	
	Appreciation of the relationship between the Department of Health, NHS England and individual provider and commissioning organisations.		√	

<b>Skills Capabilities &amp; Attributes</b>	<p>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</p> <p>Persuade board and senior managers of the respective merits of different options, innovation and new market opportunities.</p> <p>Negotiate on difficult and very complex and detailed issues.</p> <p>Strategic thinking – ability to anticipate and resolve problems before they arise.</p> <p>Problem solving skills and ability to respond to sudden unexpected demands.</p> <p>Ability to analyse complex facts and situations and develop a range of options</p> <p>Takes decisions on difficult and contentious issues where there may be a number of courses of action.</p> <p>Plans and organises a broad range of complex activities, formulating and adjusting plans to reflect changing circumstances.</p> <p>Inputs to strategic plans across the organisation and within the specific teams.</p> <p>Demonstrable ability to deliver at pace in complex environment.</p> <p>Works with stakeholders to develop performance improvement plans and to develop plans for innovation</p> <p>Demonstrable experience of delivering results through the development and management of teams to ensure success and use a range of levers in the absence of direct line management responsibility</p> <p>Ability to build effective cross functional working relationships across a diverse range of stakeholders to drive organisational agenda</p>	<p>√</p> <p>√</p> <p>√</p> <p>√</p> <p>√</p> <p>√</p> <p>√</p> <p>√</p> <p>√</p> <p>√</p> <p>√</p>		<p>A/I</p>
<b>Values and Behaviours</b>	<p>Commitment to and focused on quality, promotes high standards in all they do.</p> <p>Able to make a connection between their work and the benefit to patients and the public.</p> <p>Consistently thinks about how their work can help and support frontline staff deliver better outcomes for patients.</p> <p>Works well with others, is positive and helpful, listens, involves, respects and learns from the contribution of others.</p> <p>Consistently looks to improve what they do, looks for successful tried and tested ways of working, and also seeks out innovation.</p> <p>Demonstrable commitment to partnership working with a range of external organisations.</p>	<p>√</p> <p>√</p> <p>√</p> <p>√</p> <p>√</p> <p>√</p>		<p>A/I</p>



	<p>Demonstrates knowledge and understanding of equality of opportunity and diversity taking into account and being aware of how individual actions contribute to and make a difference to the equality agenda</p> <p>Ensures staff for whom the post holder has line management responsibility uphold and promote the equality and diversity agenda, and act in accordance with the equality, diversity, and inclusion in the workplace policy.</p> <p>Demonstrates knowledge and understanding of equality of opportunity and diversity.</p> <p>Self-awareness in terms of emotional intelligence, biases and personal triggers with cultural sensitivity and awareness.</p> <p>Values diversity and difference operates with integrity and openness</p>	<p>√</p> <p>√</p> <p>√</p> <p>√</p> <p>√</p>		
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Other	Ability to travel across multiple sites where required	√		A/I
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\* Evidence will take place with reference to the following information:

<b>A</b>	Application form
<b>I</b>	Interview
<b>T</b>	Test or Assessment
<b>C</b>	Certificate

