

## Job Description

**Role Title:** Assistant Finance Manager  
**Band:** 5  
**Contract:** Permanent  
**Responsible to:** Deputy Head of Group Finance  
**Accountable to:** Senior Head of Group Finance  
**Location:** Financial Management

### Key working relationships:

- Group Management Team (e.g. Clinical Directors / Group Managers / Modern Matrons)
- Budget Holders
- Representatives of External Bodies
- Finance Departments
- Other Core Departments (People Directorate / ICT)

### Our Vision, Values and Behaviours

At University Hospitals Coventry and Warwickshire (UHCW) NHS Trust our vision is to be a national and international leader in healthcare, rooted in our communities. Our Organisational Strategy *More than a Hospital* (2022-2030) was shaped by the views of our staff, patients and stakeholders and sets a clear plan for improvements in healthcare.

We aim to deliver the best care for our communities, being exceptional in everything we do. We do this by providing proactive, joined up support for local people and we deliver specialised services for those with the most complex health conditions. We set out to create the best experiences for our staff and work positively in partnership with other organisations to achieve the best healthcare outcomes.

Our vision and purpose are underpinned by a clear set of values that reflect the culture we want to create: *Compassion, Openness, Pride, Partnership, Improve, Learn and Respect*. Developed by our staff, our seven values guide what we do daily. Whatever our role or level, we commit to uphold these values as we work together to deliver world class care.



### Net Zero and Sustainability.

UHCW NHS Trust, by virtue of its Green Plan, is committed to ensuring that the way we provide services minimises the impact on the environment and the future health of the public e.g. zero waste to landfill, reducing our carbon footprint and increasing our recycling and reuse percentages.

### Job Summary

To work within the Group Finance Team to provide comprehensive financial advice to Service and Speciality managers to enable the achievement of financial balance and contribute to the business planning process and service developments.

The post holder will be part of a team directly involved in the maintenance of the general ledger and budgetary control system and ensuring compliance with all finance policies and procedures [including the Trust's Standing Financial Instructions (SFIs)].

### **Main duties**

As part of our commitment to patients and delivery of a world class service for all we have created the UHCW Improvement (UHCWi) System in partnership with the Virginia Mason Institute in Seattle; this involves a structured approach to removing waste and putting the patient first using a lean management system and methodologies.

Our culture and ways of working reflect and embed the practices and methodologies of UHCWi. You are expected, where identified, to attend and complete relevant training and development opportunities to support this. This may include Lean for Leaders, Advanced Lean Training, and the Human Factors Programme, amongst others. Full attendance and completion of identified courses is considered essential and a prerequisite for this post.

### **Team Working, Managing & Leading**

Works with others cooperatively in a way which secures trust and commitment; motivates individuals and teams to secure their high performance.

1. Co-ordinate the work of the Finance Assistants where appropriate.
2. The role requires the post-holder to plan, organise and manage their time effectively, establishing own priorities on a day-to-day basis and allocate work to more junior members of the team and provide training as appropriate to apprentices and other junior team members.
3. The post-holder will be required to demonstrate a positive attitude to personal development and undertake training as required in the personal development plan.
4. To support the Senior Head of Group Finance in providing support to the Corporate Planning team with the supply of relevant financial information and the monitoring of performance.

### **Business Partnering**

Contributes to the development of the organisation by providing business focused, commercially viable, creative advice.

1. The ability to communicate verbally and in writing with all levels of management and staff in a concise, confident and accurate manner giving due regard to confidentiality. The post entails regular communications with clinical and non-clinical personnel, e.g. budget holders, group managers, senior nurses and also with external customers and suppliers at a range of levels
2. To advise and support appropriate discrete areas of the Group/Speciality/Departments in the identification and achievement of waste reduction to achieve and maintain financial balance.
3. To contribute to the provision of work activities within the Group/Speciality/Departments to provide financial advice to managers, and to ensure the availability of relevant information to provide accurate forecasts of potential future activities.
4. Establishing and maintaining regular communication with managers, so as to facilitate financial input to the decision-making processes and gain a better understanding of operational activities being undertaken.

5. Maintaining an effective working relationship with other individuals of the finance function, other officers of the Trust and members of the public, ensuring that work is carried out efficiently, to a high standard, to deliver a professional service focused on achieving a high level of customer satisfaction.
6. Where appropriate, liaise with other external organisations to help resolve invoice queries (payables and receivables) to assist with facilitating payment and improving cash flow.

### **Management & Business Accounting**

Works collaboratively with all stakeholders, developing and maintaining effective relationships and providing an excellent service to them.

1. The post-holder will support the production of monthly management information making use of the Trust financial systems. The post-holder will post accounting journals to correctly reflect the financial position of differing parts of the Trust organisation.
2. Calculate accruals, prepayments and adjustments to be reflected in the monthly management accounts and maintain a clear audit trail by means of adherence to trust financial procedures and International Financial Reporting Standards (IFRS).
3. Quality check month end reports for accuracy.
4. Produce a year end forecast projection to assist with the management of budgets.
5. To obtain timely interpretations of budget variances which are used to agree appropriate action with managers to avoid further overspends, and to develop recovery plans if necessary.
6. The post-holder will support the delivery of a completed set of draft accounts for review each month. Following review, they will be responsible for any corrections/adjustments required. The post-holder will need a working knowledge of the operation of an integrated general ledger system.
7. To advise on the interpretation of monthly financial reports to ensure that managers have accurate financial information to be incorporated in the decision-making process.
8. Support the production of the statutory annual accounts including the provision of information and carrying out various end-of-year tasks including co-ordination of stock takes within the Group.
9. Support the annual financial planning/budget setting process for all specialties, within the Group for which they are responsible, in line with the Trust's timetable. Support the process of identifying, co-ordinating and quantifying of service developments, cost pressures and waste reduction schemes to support the annual objectives.
10. Obtain the signed agreement of each individual budget holder within the Group to the proposed budget.
11. Contribute to the completion of the Trust's reference cost/SLR returns by assisting other finance staff as appropriate. This will include the gathering and validation of information which will enable accurate costs of individual services to be established.
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### **Using Information Technology**

Uses IT to gather, interpret and manipulate information to meet the needs of the Function and the Service as a whole.

1. The jobholder will need to display a professional approach at all times and take ownership of the quality of financial information delivered to Trust management. The post-holder should be able to identify areas of process that require improvement and suggest options for delivering improvements.
2. The jobholder will need to be highly numerate and demonstrate a working knowledge of computerised software packages, The post-holder is required to translate complex numerical data and technical concepts in a meaningful way to non-finance staff.
3. Create and generate reports using excel spreadsheets and databases to communicate financial information to managers on a regular basis.

### **Governance and Managing Risk**

Develops and implements actions to strengthen corporate governance throughout the department.

1. Set, maintain and review Group/Speciality/Departmental budgets in accordance with Trust SFIs, Budgetary Control Policy and the Reporting Timetable.
2. Ensure that there are appropriate internal controls in place within the Group to manage expenditure appropriately and reduce the risk of fraud and other losses.
3. Support the implementation of national policies across the Trust e.g. Payment by Results and Agenda for Change and implement these within own areas.
4. Ensure that Standing Financial Instructions (SFIs) are followed within the Group, involving advising staff and monitoring compliance. Where breaches are discovered, ensure appropriate action is taken, in compliance with Trust policies.
5. Maintain knowledge - theory and experience - of financial and accounting procedures, financial aspects of NHS legislation and NHS financial policies.
6. Maintaining professional knowledge to ensure any financial advice is given with the latest information from NHS/Trust or professional bodies.

### **Personal Qualities**

#### **Integrity**

Acts in an open, honest, and fair way with everyone. Speaks up if they see something happening which is unacceptable, or which is inconsistent with the values of the NHS, their organisation, or their profession. Will say 'no' respectfully if they are asked to do the wrong thing. Maintains confidentiality and is always discreet.

#### **Self-awareness and Self-management**

Aware of how they are feeling and can stay objective when required in order to deal with situations wisely. Aware of the impact they have on others and can adapt their behaviour when required, whether they are collaborating face to face or virtually. Aware of their own strengths and weaknesses; knows when they need to seek assistance and is confident enough to do so. Able to reflect, to learn from situations and to continuously improve.

**Compassion and Care**

Demonstrates compassion, care and respect in their behaviour towards others and themselves. Shows empathy and sensitivity when dealing with difficult situations. Shows others that they value them by taking the time to listen and by being supportive. Shows an awareness of the safety of others when working in common spaces and takes account of people's well-being, encouraging others to do the same.

**Resilience**

Remains calm, objective and determined in the face of challenging situations. Remains optimistic and positive in the face of difficulties and keeps their eyes on the end goal. Commits time to building their own support networks, is aware of the available help and is open to accessing it if needed - and will encourage others to do the same. Recognises when they are becoming stressed and uses techniques to address their concerns, minimising the impact upon themselves and their colleagues.

**Inclusion and Diversity**

Respectful of the diversity within the team and celebrates the diverse makeup of the team. Promotes a career within NHS Finance within the local community. Takes part in locally delivered ED&I training. Calls out any unacceptable behaviour, with confidence to challenge and make improvements. Takes the time to understand their own unconscious bias.

## Person Specification

**Job Title:** Assistant Finance Manager

### Supporting Evidence

In the supporting evidence of your application form, you must demonstrate your experiences by giving specific examples for the criteria within the person specification.

Factors	Essential	Desirable
<b>Qualifications</b>	Studying Certificate level CCAB or equivalent accounting qualification (e.g. Level 4 AAT)	<ul style="list-style-type: none"> <li>Evidence of CPD or active personal development</li> <li>Graduate</li> </ul>
<b>Experience</b>	<ul style="list-style-type: none"> <li>Proven experience of financial management</li> <li>Record of achievement in current role</li> <li>Experience of financial management in the NHS</li> </ul>	<ul style="list-style-type: none"> <li>Dealing with Budget Holders at various levels within the organisation.</li> </ul>
<b>Knowledge</b>	<ul style="list-style-type: none"> <li>Trust financial regime</li> <li>NHS costing &amp; pricing</li> </ul>	<ul style="list-style-type: none"> <li>Other topical NHS issues.</li> </ul>
<b>Skills</b>	<ul style="list-style-type: none"> <li>Use of Microsoft Office products to an intermediate level (Basic Macro level)</li> <li>Highly numerate</li> <li>Ability to communicate clearly and concisely, both verbally and in writing</li> <li>Ability to work on own initiative within agreed parameters.</li> <li>Ability to adhere to tight deadlines.</li> <li>Able to work as part of a team.</li> </ul>	<ul style="list-style-type: none"> <li>Use of databases</li> <li>Ability to manipulate data into useful information.</li> <li>Influencing / negotiation skills</li> </ul>

<b>Commitment to Trust Values and Behaviours</b>	<ul style="list-style-type: none"> <li>• Passes Occupational Health screening.</li> <li>• Keen to develop the role and undertake further development.</li> <li>• Must be able to demonstrate behaviours consistent with the Trust's values. <i>(As detailed in UHCW's Values in Action document below)</i></li> <li>• Hybrid Working</li> </ul>	
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## Contractual Responsibilities

- **Confidentiality:** The post holder must maintain confidentiality, security and integrity of information relating to patients, staff and other Health Services business.
- **Health and Safety:** All staff must be familiar with the Trust Health and Safety Policy, including a thorough understanding of personal responsibilities for maintaining own health and safety and others.
- **Risk Management:** All staff need a basic working knowledge of risk management to enable them to participate in identification and control of all business risks they encounter in their area of work.
- **Equality and Diversity:** Everyone has the opportunity to be treated with dignity and respect at work and has a clear responsibility to comply with the detail and the spirit of the Dignity at Work Policy.
- **Infection Control and Prevention:** The Trust is committed to minimising risks of healthcare associated infection to patients, visitors and staff. All employees are required to be familiar with and comply with Infection Prevention and Control policies relevant to their area of work.
- **Safeguarding Vulnerable Adults and Children:** The Trust is committed to ensuring the safeguarding of vulnerable adults and children in our care. All employees are required to be familiar with their responsibilities in this area and to raise any concerns as appropriate.
- **Conflict of Interest:** The Trust is responsible for ensuring that the service provided for patients in its care meets the highest possible standard. Equally, the Trust is responsible for ensuring that staff do not abuse their official position for personal gain or to benefit their family or friends. The Trust's Standing Financial Instructions require any officer to declare any interest, direct or indirect, with contract involving the Trust. Staff are not allowed to further their private interests in the course of their NHS duties.
- **Working Time Regulations:** The Working Time Regulations 1998 require that you should not work more than an average of 48 hours in each working week. For example, in a 26 week period you should work no more than 1,248 hours. Employees may choose to opt out by providing written notification as appropriate.

**The above duties and responsibilities are intended to represent current priorities and are not meant to be an exhaustive list. The post holder may from time to time be asked to undertake other reasonable duties and responsibilities. Any changes will be made in discussion with the post holder according to service needs.**

## Our values in action

We live our values in action in our work with patients, visitors and colleagues.

- ✓ Being polite and introducing ourselves to everyone we meet.
- ✓ Treating everybody as individuals and respecting their needs.
- ✓ Being approachable, caring and helpful at all times.
- ✓ Communicating with patients, visitors and colleagues, respecting confidentiality and privacy.
- ✓ Taking the time to actively listen and understand individual needs.
- ✓ Being open and honest.
- ✓ Acknowledging that we don't always get it right.
- ✓ Speaking out when we see things aren't right and supporting others to do the same.
- ✓ Giving praise and saying thank you for a job well done.
- ✓ Celebrating and recognising personal, team and organisational achievements.
- ✓ Using the skills, experience and diversity of staff to better deliver our objectives and services.
- ✓ Actively working with patients and visitors to improve services.
- ✓ Seeking and adopting best practice from colleagues and other teams within UHCW.
- ✓ Taking personal responsibility for our own learning.
- ✓ Keeping up-to-date with mandatory and professional development
- ✓ Developing ourselves and others, independent of our job role or profession
- ✓ Taking personal responsibility to make improvements by suggesting new ways of doing things
- ✓ Taking opportunities to learn with and from others
- ✓ Embracing change and supporting others through it
- ✓ Putting in place ways to receive feedback and acting to change things
- ✓ Seeking and adopting best practice from colleagues and other teams within UHCW
- ✓ Working across boundaries to improve the experience of patients, visitors and colleagues

