

**JOB DESCRIPTION**

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| **JOB TITLE: Business Intelligence Accountant** |  |
| **BAND: Band 6** |  |
| **DEPARTMENT: Central Finance** |  |
| **LOCATION: Arran House, St Nicholas Hospital** |  |
| **ACCOUNTABLE TO: Head of Management Accounts** |  |
| **REPORTS TO: Head of Management Accounts** |  |
| **RESPONSIBLE FOR:**   |  | | --- | | **MAIN PURPOSE OF THE JOB**  Responsible for the provision of a comprehensive financial management service to support services budget and service managers, which includes the provision of specialist advice to budget managers that ensures the most effective, economic and efficient use of resources. Support in identifying and delivering efficiencies from the central budgets.  Ensuring that monthly budget reporting information is produced in accordance with financial procedures and within set deadlines. Work with the Transactional teams to support systems to deliver financial information efficiency and accurately.  Maintain the Trust’s budgets and deliver support to the Trust’s budget setting process.  Provide financial analysis to the Clinical Group Management Support Teams to support Deep Dives into areas of pressure or areas under review where necessary.  Supporting the Head of Management Accounts to deliver the Trust’s Annual budgets.  Support the development of the Trust’s business intelligence and costing system.  To deputise for the Head of Management Accounts as and when required, on issues relating to areas covered by this post. | |  |
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| **DIMENSIONS**  Northumberland, Tyne and Wear NHS Foundation Trust is one of the largest mental health and disability Trusts in England, employing more than 6,000 staff, serving a population of approximately 1.4 million, providing services across an area totalling 2,200 square miles. We work from over 60 sites across Northumberland, Newcastle, North Tyneside, Gateshead, South Tyneside, Sunderland and North Easington. | |
| **The post holder will commit to the vision and values of the Trust** | |
| **VISION AND VALUES**  The way we relate to each other, the way that we do our work needs to be reflective of our Trust’s values. We all, regardless of role or seniority have an obligation to make sure that we live by our values.  Our values are: | |
| To be caring and compassionate | |
| * Put ourselves in other people’s shoes * Listen and offer hope * Focus on recovery * Be approachable * Be sensitive and considerate * Be helpful * Go the extra mile | |
| To be respectful | |
| * Value the skill and contribution of others * Give respect to all people * Respect and embrace difference * Encourage innovation and be open to new ideas * Work together and value our partners | |
| To be honest and transparent | |
| * Have no secrets * Be open and truthful * Accept what is wrong and strive to put it right * Share information * Be accountable or our actions | |
| **ORGANISATIONAL CHART** | |
| **ONLY FOR CLINICAL STAFF** | |
| **CORE COMPETENCIES**   * **Clinical Leadership** * **Patient Care** * **Professional Practice** * **Practice Development** * **Ensure that the care delivered is compassionate, competent, and courageous underpinned by a commitment to high standards and effective communication.** | |
| **COMMUNICATION & RELATIONSHIPS**  To provide, receive complex sensitive information where developed, persuasive, motivational, training or re-assurance skills are required. This may be because agreement or cooperation is required or because there are barriers to understanding, acceptance; hostile, antagonistic or highly emotive atmosphere.  **Internal**  Heads of Department  Heads of Business Development  Business Development Advisor  All support service staff  Senior Clinicians and Managers  All levels of staff across the Trust  Internal Audit  **External**  Commissioners  External Audit  Other NHS and Foundation Trusts  Local Authorities  Payroll Provider | |
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| **KNOWLEDGE, SKILLS, TRAINING AND EXPERIENCE**  Developed specialist knowledge across work procedures, underpinned by theory and experience.  Qualification/Education   * Minimum CCAB or CIMA part qualified * In exception circumstances, progressing towards the necessary qualification | |
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| **ANALYTICAL AND JUDGEMENTAL SKILLS**  Analysis of complex facts and situations requiring interpretation and comparisons of a range of options   * Complex analytical skills * Prioritise own workload * To critically appraise and develop new concepts and actively pursue ways of improving financial information and systems. * To manage a high degree of organisational and informational complexity and the ability to translate complex data into understandable information. * Possess a high level of interpersonal skills and be able to communicate effectively with a wide range of individuals | |
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| **PLANNING AND ORGANISATIONAL SKILLS**   * The ability to plan and organise a broad range of activities which require continuous review. * To achieve deadlines and work under pressure * To set clear targets and delegate, while controlling the workload and ability to motivate a multi-disciplined workforce. | |
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| **PHYSICAL SKILLS**  Standard keyboard skills  Driving Licence | |
| **PATIENT CARE AND FAMILY INVOLVEMENT**  Assist Patients/Clients/Relatives during incidental contact. | |
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| **POLICY AND SERVICE DEVELOPMENT**   * Responsible for policy implementation and support development for a directorate or equivalent | |
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| **FINANCIAL AND PHYSICAL RESOURCES**   * Delivers the Trust’s monthly finance reports * Supports delivery of the Trust’s overall budget setting * Reviews and develops the Trust’s financial reporting to ensure budget holders receive timely, relevant and accurate financial information that is focused on the delivery of organisational goals. This focuses on reporting performance against plans. * Supports delivery of Trust’s Financial delivery plan from Support Services areas * Maintains the Trust’s budgets and supports the Budget Setting process. * Supports maintenance of the Trust’s costing and business intelligence information with accurate apportionment information and patent level information where available. * To ensure risks to delivery of the financial plan are highlighted to Trust management at the appropriate level. Where there are risks to financial delivery within the Support Services budgets to work with budget managers to identify remedial actions to bring performance back in line with plan. | |
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| **HUMAN RESOURCES**   * To undertake all statutory and mandatory and essential training in accordance with timescales * To review office procedures and work flows in order to ensure continual improvement in the standard of the service provided * Work to provide a supportive and productive environment for staff. This includes delivering training to Finance staff * To promote positive employee relations and communications. * To work closely and collaboratively with all directorate colleagues ensuring information is shared fully and that any issues that may fall between functions are picked up appropriately * To deputies for the Head of Business Development (Corporate) / Senior Business Intelligence Accountant and attend meetings as and when required | |
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| **INFORMATION RESOURCES**   * To be aware of developments in NHS Finance and good accounting practice and where appropriate ensure relevant information is provided to other finance staff * To ensure that underpinning systems, processes, procedures are in place to ensure the accuracy and validity of financial reporting, including the reporting of provisions and accruals * To support maintenance of the business case log and tenders log. * Liaison with Internal & External audit for both routine and statutory audits and the provision of any information required | |
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| **RESEARCH AND DEVELOPMENT**   * Undertakes audits and surveys as necessary in own work area | |
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| **FREEDOM TO ACT**   * The post holder works autonomously and is guided by broad NHS policies and must interpret how they will be implemented across their work | |
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| **Effort and Environment** | |
| **Physical:**   * The role will require inputting at a keyboard for most of the day | |
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| **Mental:**   * The role requires frequent concentration where work patterns maybe unpredictable as the post holder may be dealing with a number of issues at a given time. The post holder also regularly needs to respond to requests for information from senior staff | |
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| **Emotional:**   * The post holder will have occasional exposure to potentially stressful or emotional circumstances due to the need to meet deadlines or deliver information at short notice. | |
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| **SAFEGUARDING**  Every employee has a responsibility for safeguarding and protecting adults and children from abuse, regardless of the setting in which the care takes place. It is every employee’s responsibility to be aware of relevant Trust Policies. All employees should take part in training in order to maintain their skills. Front line practitioners should access regular supervision and support in line with local procedures.  **HEALTH AND SAFETY**  Contribute to maintaining a safe environment of care through effective risk management. Identify risks and develop appropriate strategies to manage the risks including responding appropriately to untoward/emergency situations.  **TRUST CLINICAL GOVERNANCE STRATEGY**  It is the responsibility of all health care professionals to play an active role in delivering the clinical governance agenda. There is a specific responsibility for individual health care professionals to be involved in auditing their own and their team’s clinical performance, and to engage in activities, which continuously improve, the quality of services they provide  **Information of a Confidential Nature or Access to Confidential Information**  “To be aware of the nature of information dealt within the NHS and to work in a manner which ensures confidentiality and security of this information”  **INFECTION CONTROL**  All Trust staff (clinical and non-clinical, including locum and agency staff employed by external contractors) have a personal responsibility to ensure the risk of infection to themselves, service users and visitors is minimised by ensuring that they (1) are familiar and adhere to, current Trust policy and guidance on infection prevention and control, (2) participate in the Trusts induction programme and statutory/required training in infection prevention and control and (3) consider infection prevention and control as part of their appraisal and/or personal development plans’. | |
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| **CALDICOTT RESPONSIBILITIES:**  **Principle 1. Justify the purpose(s) for using confidential information**  Every proposed use or transfer of personal confidential data within or from an organisation should be clearly defined, scrutinised and documented, with continuing uses regularly reviewed, by an appropriate guardian.  **Principle 2. Don't use personal confidential data unless it is absolutely necessary**  Personal confidential data items should not be included unless it is essential for the specified purpose(s) of that flow. The need for patients to be identified should be considered at each stage of satisfying the purpose(s).  **Principle 3. Use the minimum necessary personal confidential data**  Where use of personal confidential data is considered to be essential, the inclusion of each individual item of data should be considered and justified so that the minimum amount of personal confidential data is transferred or accessible as is necessary for a given function to be carried out.  **Principle 4. Access to personal confidential data should be on a strict need-to-know basis**  Only those individuals who need access to personal confidential data should have access to it, and they should only have access to the data items that they need to see. This may mean introducing access controls or splitting data flows where one data flow is used for several purposes.  **Principle 5. Everyone with access to personal confidential data should be aware of their responsibilities**  Action should be taken to ensure that those handling personal confidential data - both clinical and non-clinical staff - are made fully aware of their responsibilities and obligations to respect patient confidentiality.  **Principle 6. Comply with the law**  Every use of personal confidential data must be lawful. Someone in each organisation handling personal confidential data should be responsible for ensuring that the organisation complies with legal requirements.  **Principle 7. The duty to share information can be as important as the duty to protect patient confidentiality**  Health and social care professionals should have the confidence to share information in the best interests of their patients within the framework set out by these principles. They should be supported by the policies of their employers, regulators and professional bodies. | |
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| **Sustainability**  The Trust attaches great importance to sustainability and corporate social responsibility. To achieve this, it is the responsibility of all staff to minimise the environmental impact of their day to day activities and address to Trust policies on sustainability, waste, resource usage and governance. | |
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| **Clinical Effectiveness:**  This section involves ensuring that health care professionals are aware of their responsibility to be clinically effective in their role. Clinical effectiveness refers to the extent to which our interventions do what they are intended to do – maintain and improve the health of service users, and secure the greatest possible health gain from the available resources.  To practise clinical effectiveness means to provide the highest standards of care based on sound evidence. There is an expectation that staff think critically about what they do, question whether it is having the desired result and make necessary changes to practice. His approach is applicable at all levels within the NTW meaning that clinical effectiveness is everyone’s responsibility. Therefore all members of staff should aim to contribute towards this though using the critical thinking approach above in order to deliver improvement. There is also a specific responsibility for individual health care professionals to be involved in auditing their own and their team’s clinical performance, and to engage in activities which continuously improve the quality of services that they provide.  Staff should aim to ensure that this is part of their everyday work and to monitor how this helps to achieve personal clinical effectiveness. As part of continuing professional development there is an expectation that staff are able to demonstrate where they have contributed to clinical effectiveness through the NTW appraisal system, through personal development plans, and where appropriate, thought clinical supervision procedures. | |
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| **ACCESS TO CONFIDENTIAL INFORMATION:**  To be aware of the nature of information dealt with within the NHS, and to work in a manner, which ensures confidentiality and security of this information.  **This job description is not intended to be an exhaustive list of the duties and responsibilities of the post and the post holder may be requested to carry out any other duties appropriate to the grade or post.**  **The post may change over time to meet organisational requirements and the job description may be changed after consultation with the post holder at any time.** | |
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| **JOB DESCRIPTION AGREEMENT**  **Post Title: …………………………………………………………………………………….**  **Post Holder’s Name: ……………………………………………………………………….**  **Post Holder’s Signature: ……………………………………….. Date:…………………**  **Line Manager’s Name: ……………………………………………………………………..**  **Line Manager’s Signature: ………………………………………Date: …………..…….** | |



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| **QUALIFICATIONS** | **ESSENTIAL** | **DESIRABLE** |
| **Certificates and Experience** | CCAB or CIMA Part Qualified and actively training towards full CCAB or CIMA qualifications  or in exceptional circumstances significant relevant experience  (4 years) |  |
| **Knowledge** | Significant Finance experience  Extensive experience of using a financial ledger package and the use of spreadsheets  Experience of managing relationships with colleagues across a range of disciplines within the organisation and with contacts in external organisations  A good knowledge of generally accepted accounting principles, awareness of standing orders, reservation of powers to the board and delegation of powers, SFIs, Fraud Policy and , Manual for Accounts and the NHS Finance Manual.  A working knowledge of the NHS Costing guidance.  A working knowledge of the NHS Capital Investment Manual and the principles of PFI.  A working knowledge of the finance/business environment facing a large NHS Trust  An in depth knowledge of the budget setting and financial management control practices within the Trust.  A good working knowledge of the requirements for internal control and internal audit | NHS Finance experience  Experience of  Oracle & Oracle Reporting Systems |
| **Skills** | Possess a comprehensive range of analytical, numerical, statistical and financial skills  Possess management and decision making skills, able to develop practical plans and have the ability to delegate tasks and able to lead, direct and motivate staff  Ability to achieve deadlines and prioritise work  Possess a high level of interpersonal skills and be able to communicate effectively with a wide range of individuals and groups, both inside and outside the Trust.This will involve financial issues that can be complicated and/or sensitive where some interpretation for non-finance people is involved.  Ability to meet the mobility requirements of the post.  Good team player with ability to be self-directed and complete work to tight deadlines when necessary  Complex analytical skills are required in the role, the postholder will be required to make judgements where a number of variables require analysis, interpretation and comparison to assess an outcome.  The ability to plan and organise a broad range of complex activities which require the continuous review and adjustment of these plans, to support the Financial Management function within the Division.  The post requires physical skills which you would normally obtain through experience and practice. Such skills would include general keyboard skills  Full driver’s License. |  |
| **Behaviours** | Strategic and corporate thinking  High level of personal motivation  Enthusiastic, active in encouraging change  Fair, reasonable and approachable manner  Reliable  Team Player  Excellent communication skills  High focus on clinical service needs |  |