



Institute of Health Visiting Job Description Business and Operations Lead

Reports to: CEO

Accountable to: CEO

Salary: iHV pay band 6 - Senior/Lead Officer £47,473-£55,931 (starting pay-point based on experience) plus 10% employer contribution for iHV pension scheme.
NOTE: This salary will be subject to iHV annual pay increase which is awarded at the end of July and backdated to April.

Terms of employment: Permanent position. The iHV is a flexible working employer: there are core hours of work for this post but we can offer flexibility for employees on request and in line with our flexible working policy.

Hours: Full time, 37 hours per week

Location: Blend of office/ home-based: The official place of work will be the iHV Emsworth office, Hampshire, PO10 – however, since the pandemic, we have introduced a blend of home working and office-based attendance for this role. The postholder will be required to work in our Emsworth office on average about two days per week, with the option to work flexibly from home for the remaining days (flexibility will be needed to meet the needs of the organisation). The post also requires occasional travel in the UK.

Key Relationships: CEO, board of the iHV, Head of HR, iHV corporate team Leads and other team members across the organisation.

Leave: 25 days per year (increasing to 30 days per year after 2 years continuous employment at the iHV) plus bank holidays (pro rata for part-time staff).

Institute of Health Visiting

The Institute of Health Visiting (iHV) is an independent charity, professional body and Centre of Excellence – established to strengthen the quality and consistency of health visiting practice, so that health visitors can effectively respond to the health needs of all babies, children, families and communities enabling them to achieve their optimum level of health, thereby reducing health inequalities. The core focus of its work is on education, research, quality improvement, professional development and policy influencing - providing leadership and a collective “voice” for the profession.

The iHV is a UK-wide organisation (www.ihv.org.uk) for health visitors, members of health visiting teams, students, retired practitioners and those interested in the profession, who join as iHV members through a variety of schemes that we offer.

Summary of Job Purpose

The Business and Operations Lead plays a vital role in managing and developing the operational business functions of the organisation and supporting its charitable aims; working closely with the CEO to deliver and improve the organisation's strategic planning, operational delivery, and budgeting/finance processes. The postholder plays a vital role in ensuring that the day-to-day operations of the iHV run smoothly, with key functions:

- Leading iHV business and financial management, including accounting, budgeting, reporting, strategic planning and risk management.
 - Work closely with the CEO, senior leadership team and our accountants to align financial and operational strategies.
 - Manage financial controls, procedures, and systems.
 - Collaborate with various departments, including external stakeholders, for effective budgeting and operational management.
- Leading iHV operations:
 - Senior responsibility for administrative, legal, and compliance functions, ensuring smooth operations. This will include management of our Emsworth Office, IT and risks, supporting business planning and change management.
 - Lead the operational change for a new Customer Relationship Management (CRM) system and website. iHV Project Lead working with the supplier, the Project Manager and a small team at the iHV to ensure that the project is delivered within the specified time, cost and quality parameters of the specification.
 - Working closely with our part-time Head of HR, supporting the senior management team and line managers with HR matters, including recruitment.
 - Line management responsibilities of designated staff in the corporate team, supporting business administration.
 - Working with the CEO to ensure good governance of Board-related matters, collating Board papers and attending quarterly Board meetings.

Key areas of responsibility:

Business and financial management:

- Maintain and develop robust quality assurance processes for income and expenditure, working with our CEO and accountants, to ensure all financial and reputational risks are effectively managed.
- Ensure effective financial processes across the iHV, with systems in place for invoicing, managing iHV payments and standing orders, and chasing outstanding payments and debtors.
- Build departmental budgets, supporting leads with forecasting, budget tracking, monthly monitoring (management accounts are produced by our independent accountants), to inform workforce planning.
- Work with department leads to prepare budgets for tenders and project/ research grant applications, including determining when VAT is applicable.
- Process invoices, iHV card payments, direct debits, standing orders, expense claims forms and ordering of office supplies, with support from the Corporate Team Administrator.
- Support leads to manage contracting, invoicing and reporting to external funders in accordance with funder requirements. Ensure all new funding streams and other costs are accurately recorded by the accountants.
- Ensure management of the corporate member joiners to the organisation, including invoicing and setting up a process for re-invoicing.
- Work closely with the external accountants to provide information on monthly suspense, debtors, mis-postings and general queries in relation to iHV finance. Ensure the iHV's reconciliation and remittance records are updated weekly.
- Ensure all financial documentation is available for scrutiny as required, including support for annual financial audit by independent auditors.

- Make recommendations, provide advice, and prepare strategic reports and briefings as required.

Operational Management and Governance:

- Support the CEO and department leads in managing human resources, risk management, quality assurance, operational change and board functions.
- Support iHV business planning and the development of key objectives and priorities for the corporate Team (in partnership with the CEO and other leads within the corporate team).
- Oversee the operational needs of the Institute – supporting leads within the organisation with workflow mapping, business continuity and planning to support matrix working across the organisation.
- Recording and monitoring of business risks across the organisation to enable risk management, reporting to the Board and providing support in association with the CEO.
- Support the board, providing secretariat functions to board meetings, including ensuring all papers are provided on time, managing sensitive information and taking board minutes.
- Work with the CEO to develop, co-ordinate and implement organisational policies throughout the Institute.
- Support the CEO with reporting to the Charity Commission/ Companies House and ensuring that the organisation's charitable obligations are met. Work with external auditors to deliver the annual audits; and ensure that the relevant documentation is held in line with requirements, is available for external auditing, and the delivery of audit recommendations are tracked.
- Support Health & Safety risk management, ensuring risk assessments are in place, processes and policies are up to date and staff are trained and informed with any changes.

Information Technology

- Management of robust administration and business support systems, including negotiation and management of IT agreements, subscriptions, licences and contracts as required, providing recommendations for improvements and efficiencies to the CEO.
- Facilities management of required IT and infrastructure to include details of equipment held and provision of Microsoft/ other required licences.
- Liaise and schedule work to be undertaken under external IT support contract.
- Lead operational change for new Customer Relationship Management (CRM) system and website – working with a dedicated project manager who has scoped our organisational requirements (almost completed), to finalise the invitation to tender (ITT), manage the procurement process, evaluate submissions with a small in-house change team at the iHV, and make recommendations to the board. The postholder will lead the project for the iHV, working with the supplier, the Project Manager and a small team at the iHV to ensure that the project is delivered within the specified time, cost and quality parameters of the specification and is robustly tested before launching.
- Information management and analysis to highlight issues/risks and support decision making – work with Head of HR to ensure iHV compliance with GDPR.

Human Resources

- Management of our Emsworth office with line management responsibility for a small number of designated staff in the corporate team that support business management (currently the Corporate Team Administrator), supporting the delivery of team objectives within the iHV Business Plan.
- Support, motivate and develop staff, managing direct report's annual performance development review (PDR) and performance management if required.
- Work closely with the Head of HR to make sure that good employment practices are universally embedded operationally within the iHV.
- Support staff recruitment and the induction of new staff; provide advice to staff on corporate

policies and procedures and communicate changes.

- Support the Performance Development review process for the iHV, collating 360 feedback for iHV employees where requested, and maintaining records for annual PDR outcomes.
- Maintain oversight of the recording of annual leave with the Corporate team administrator, Head of HR and department leads.
- Provide operational leadership and management for team awayday (leading a small team to plan this each year), to support team building and staff development.

Other:

- Have an excellent professional working relationship with colleagues to deliver corporate goals and objectives in line with iHV Vision and Values.
- Help at iHV conference and events, working with our Events Manager and overseeing the work of the Corporate administrator to ensure that venues, travel, accommodation and materials are booked and delivered on time.
- To participate in all mandatory and individual training as required. To highlight their learning and development needs to the CEO on induction, at the annual PDR, and as needed, to ensure capability to deliver key role functions.

NB

- The above is only an outline of the tasks and responsibilities required of the role. You will carry out any other duties as may reasonably be required by your line manager.
- The iHV is an expanding and evolving organisation, as such the job description and person specification will be reviewed on an ongoing basis in accordance with the evolving needs of the wider team.

INSTITUTE OF HEALTH VISITING
Person specification
Post-title: Business and Operations Lead

Criteria	Essential	Desirable	Method of Assessment
Qualifications	<p>High level of numeracy, literacy, and IT skills.</p> <p>Degree in business administration or related field, or equivalent qualification/ post-grad evidence of additional training/courses undertaken.</p> <p>Programme Management qualification (PRINCE2, AGILE or equivalent).</p>		Application, Interview, Certificates
Experience	<p>Proven work experience as Operations/Finance Manager or similar role. Prior experience of strengthening organisational effectiveness.</p> <p>Significant experience of budgeting, financial management, contract management and forecasting.</p> <p>Experience of operational and staff management.</p>	<p>Experience in the IT industry and/ or healthcare.</p> <p>Previous experience working for a membership organisation.</p> <p>Previous experience working for a charity.</p> <p>Experience of Charity Accounting.</p>	Application, Interview, References
Skills, Ability, Knowledge	<p>A self-starter with the ability to work on their own initiative, work within deadlines, managing multiple and competing tasks.</p> <p>Working knowledge and skills in the use of business and financial principles and systems.</p> <p>Excellent IT skills – experience of working</p>	<p>Familiar with Salesforce, Customer Relationship Management (CRM) systems and their capabilities.</p>	Application, Interview, References

	<p>with a range of IT systems and project software. Familiar with Xero, Stripe, PayPal, GoCardless, Asperato or related financial software systems including purchasing, invoicing, reconciliation, debt rectification and financial reporting.</p> <p>Outstanding organisational, strategic thinking and problem-solving skills – ability to anticipate and resolve problems before they arise and respond to sudden unexpected demands. The ability to analyse complex facts and situations and develop a range of options.</p> <p>The ability to communicate effectively, including excellent oral and written skills and the ability to negotiate on difficult and controversial issues including performance and change.</p>		
Personal Attributes	<p>Commitment to team-working, and respect and consideration for the skills of others.</p> <p>Personal drive, energy, and enthusiasm for new challenges.</p>		Application, Interview, References
Behaviours and Values	<p>Commitment to and focused on quality, promoting high standards in all they do.</p> <p>Values diversity and difference, operates with integrity and openness.</p>	Actively develops themselves and supports others to do the same	Application, Interview, References
Other	<p>Ability to work flexibly to meet the needs of the role.</p>	Interest in working in the charitable sector to improve children’s lives.	Application, Interview, References

	<p>Able to attend meetings and events around the UK as required.</p> <p>Flexibility in supporting other iHV administration requirements on occasions.</p>		
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General responsibilities applying to all staff:

The postholder is required to follow iHV policies and procedures.

Confidentiality / Data Protection / Freedom of Information

Postholders must maintain the confidentiality of any sensitive iHV information and business in accordance with the Data Protection Act of 1998 and GDPR.

If any member of staff has communicated any such information to an unauthorised person, those staff will be subject to disciplinary action including potential dismissal. Moreover, the Data Protection Act 1998 also renders an individual liable for prosecution in the event of an unauthorised disclosure of information.

Information Governance:

All staff must comply with information governance requirements. These include statutory responsibilities (such as compliance with the Data Protection Act), following national guidance (such as the NHS Confidentiality Code of Practice) and compliance with local policies and procedures (such as the Trust's Confidentiality policy). Staff are responsible for any personal information (belonging to staff or patients) that they access and must ensure it is stored, processed, and forwarded in a secure and appropriate manner.

Equal Opportunities

Postholders must at all times fulfil their responsibilities with regard to the Institute's Equal Opportunities and Equality Policies.

The Institute of Health Visiting is fully committed to the active promotion of equality and diversity in everything that we do. We want to create an organisational culture that values diversity and demonstrates due regard to the characteristics of the Equality Act (2010) through our employment practices, the work that we do and the products and resources that we produce. We are committed to encouraging equality and diversity among our staff and eliminating unlawful discrimination.

Health and Safety

All postholders have a responsibility, under the Health and Safety at Work Act (1974) and subsequently published regulations, to ensure that the organisation's health and safety policies and procedures are complied with to maintain a safe working environment.

Risk Management

All postholders have a responsibility to report risks such as delays in delivering work programmes.

Appraisal

All staff are required to partake in a joint annual review of their work which appraises performance and behaviours, including 360 appraisal.

Values and Behaviours

The iHV has developed a clear vision for the direction of the organisation. A set of values and behaviours have also been developed and agreed to underpin this vision. All iHV employees will be expected to demonstrate an understanding of and commitment to these values and behaviours, which are reviewed through the appraisal processes.

Flexible Working

As an organisation the iHV is committed to supporting flexible working arrangements, when

possible, if they do not interfere with the successful delivery of the post-holder's responsibilities.

Safeguarding children and vulnerable adults

Postholders have a general responsibility for safeguarding children and vulnerable adults in the course of their work. They should provide evidence of a DBS.

Visa restrictions

Entitlement to work in the UK.

April 2024.

