Job description and person specification

Post:	Financial Planning & Analysis Manager
Location:	Flexible. Primary base could be anywhere in the UK, but must be willing and able to travel to London and elsewhere (mainly UK) in connection with the role
Salary:	£60k-£70k
Duration:	Permanent, full time
Reporting to:	Associate Director of Finance

About Health Data Research UK

Health Data Research UK (HDR UK) is accelerating trustworthy use of health data to enable discoveries that improve people's lives.

We are the national institute for health data science. Our vision is for large-scale data to benefit every interaction with patients, every clinical trial and every biomedical discovery, and to transform public health.

The UK is in a unique position to realise the potential of health data, thanks to the NHS and its cradle-to-grave records for a population of over 65 million people.

Safe and secure use of this data could improve treatments, deliver better health care and save lives. It could help tackle some of the biggest health challenges worldwide, including cancer, diabetes and cardiovascular disease.

However, access to this data for researchers is often a lengthy, fragmented process, meaning the potential for improving healthcare is far from being realised in full.

We work in partnership with the NHS, industry, charities and universities to realise the potential of the UK's health data in life-changing research. Patients and the public are actively involved in shaping HDR UK's work and ensuring it delivers public benefit.

The Institute played a major role in the COVID-19 pandemic, working with the NHS and collaborators internationally to link and coordinate the use of large-scale data. With these resources, scientists and doctors could understand more about this new disease, identify which drugs were effective and provide evidence to allow the NHS and policymakers to respond to the challenge.

Our successes include:
- A Trusted Research Environments (TRE) for England was created early in the pandemic with health data covering >54 million people, thanks to a collaboration between NHS Digital and HDR UK through its British Heart Foundation (BHF) Data Science Centre. TREs are highly secure computing environments that provide remote access to health data.

- During the roll out of the Pfizer-BioNTech and Oxford-AstraZeneca vaccines against Covid-19, it was vital to understand how they performed in the population. A team supported by HDR UK through the BREATHE Health Data Research Hub were able to rapidly show the high protection offered by the vaccines after a single dose, thanks to assembling linked health data for 99% of the Scottish population.
- Nearly half a million people missed out on starting medication to lower their blood pressure during the Covid-19 pandemic, according to research enabled by the BHF Data Science Centre at HDR UK. The research included 1.32 billion records of medications dispensed to 15.8 million people in England, Scotland and Wales between 1 April 2018 and 31 July 2021.
- The Green Algorithms initiative promotes more environmentally sustainable computational science and is run by Loïc Lannelongue and Michael Inouye at HDR UK Cambridge. They have built tools for carbon footprint estimation, raised awareness about the environmental impacts of algorithms and driven change in the computational science community.
- A significant landmark early in 2024 saw the first research study of health records for 67 million people in all four UK nations. It looked at gaps in Covid-19 vaccine coverage and found that between a third and a half of the populations of the four UK nations had not had the recommended number of vaccinations and boosters by summer 2022. The approach could be extended to many other areas of medicine with great potential for new discoveries in the understanding and treatment of disease.

HDR UK is a virtual institute, with staff and partners in all four nations of the UK and an office in central London. We are an independent, registered charity with five years of core funding from nine of the UK's leading medical research funders, including UK Research and Innovation, the Department of Health and Social Care in England and equivalents in Northern Ireland, Wales and Scotland, and leading medical research charities.

At Health Data Research UK, we employ talented individuals who bring their own unique skills and experience to support the Institute's vision and benefit the whole team. Our values of transparency, optimism, respect, courage and humility guide how we work together within HDR UK, with our partners and other stakeholders.

HDR UK's strategy

Our five-year objectives are to:
1. Accelerate trustworthy data use by sorting the data
- Make it easier and quicker for researchers to find, access and use high-quality, large-scale data
- Fix the technical challenges needed for swift, safe and secure data use, by assembling innovative infrastructure solutions
- Increase health research efficiency and productivity by accelerating adoption of the FAIR (Findable, Accessible, Interoperable and Reuseable) data principles

2. Improve people's lives by unlocking the power of data
- Deliver cutting-edge research that harnesses large-scale data to change health policy and practice
- Exemplify trustworthy data use to deliver research that was previously impossible
- Test and improve the infrastructure so it serves all researchers

3. Shape the future of health data research
- Connect data, people and organisations to bring about cultural change and realise the UK's potential to be at the forefront of health data innovation
- Develop people and teams with diverse perspectives and skills needed to deliver health data research
- Embed good practice in patient and public engagement and involvement to build confidence in health data research for public benefit by increasing transparency and trustworthiness.

Purpose of the post

The Financial Planning & Analysis Manager will support the Associate Director of Finance to provide insightful analysis of financial trends and oversee the recoverability of funds.
They will coordinate the month-end process and work with Finance Business Partners to coordinate the quarterly forecast and the 2026/27 budget.
They will also act as Finance Business Partner to a number of teams, working closely with Budget Holders and external partners to provide effective management of resources and risk, and monitoring of quarterly partner reporting.

The Finance & Funding Team is formed of 8 people:
- Associate Director of Finance
- Financial Planning & Analysis Manager
- Senior Finance Business Partner
- Finance Business Partner
- Junior Finance Business Partner
- Finance Manager
- Finance Officer
- Research Funding Specialist

Main responsibilities

Financial Planning & Analysis element of role (60%):

- Coordination of month-end process: overseeing the month-end checklist and coordination of FBPs; production of monthly management accounts using JET reports
- Coordination of quarterly forecasting and annual budgeting across cost centres and funds: preparation of forecasting templates; coordination of FBPs; upload and review of forecast onto finance system
- Coordination of long-term (high level) forecasting across all cost centres and funds to end of current Core Funding cycle
- Oversee the cost recovery process of new and existing funds (overhead recovery and monitoring of funding gaps)

Finance Business Partnering element of role (40%):

- Work with Budget Holders to manage financial performance, forecasts, and budgeting including understanding financial opportunities and risk for the area of business partnership.
- Provide donor reporting and analysis as required to funders of specific programmes.
- Consolidation of quarterly partner reporting

Experience

- CCAB qualified with a minimum of 5 years practical experience in financial analysis or business partnering roles.

Desirable

- Experience of fund management
- Experience of Microsoft Dynamics 365 Business Central
- Experience of JET reports
- Experience in the academic or scientific research sector
- Experience working with UKRI and/or Research Councils
- Experience of funding under Full Economic Costing (FEC) model
- Experience of managing stakeholder relationships within an academic or not-for-profit environment

Skills

- Excellent quantitative skills, use of Excel and finance systems
- Excellent written and verbal communication skills with the ability to communicate effectively and confidently with people at all levels.
- Excellent interpersonal skills and ability to handle sensitive issues positively
- Excellent organisational skills, with the ability to manage competing priorities in a fast-paced environment and to working in an agile, flexible and pragmatic way
- Ability to quickly learn and adapt to new environments
- Ability to lead and work as part of a team
- Ability to work autonomously and make decisions without supervision
- Ability to process complex information and present targeted messages to different audiences.

Dimensions

- Travel in the UK may be required to partner organisations
- HDR UK is a national institute, and our activities take place across the UK

Equal Opportunities Policy Statement

Health Data Research UK is an equal opportunities employer, and as such aims to treat all employees, consultants and applicants fairly. It is our policy to provide employment equality to all, irrespective of:

- Gender, including gender reassignment
- Marital or civil partnership status
- Having or not having dependants
- Religion or belief
- Race (including colour, nationality, ethnic or national origins)
- Disability
- Sexual orientation
- Age

We are opposed to all forms of unlawful and unfair discrimination. All job applicants and employees who work for us will be treated fairly and will not be unfairly discriminated against on any of the above grounds. Decisions about recruitment and selection, promotion, training or any other benefit will be made objectively and without unlawful discrimination.

Safeguarding

HDR UK is committed to robust safeguarding policies, we expect everyone who works with us to share our commitment to safeguarding.