



April 2016

# The NHS Finance Function in 2015: United Kingdom

A summary of the England, Wales, Scotland and Northern Ireland NHS finance staff census and staff attitudes survey

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# Briefing

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### Box 1: How we collected the data

The HFMA has worked with colleagues in England, Wales, Scotland and Northern Ireland to produce the first comprehensive finance staff census for the whole of the UK.

The census is not a mandatory collection, but the core value of it comes from its comprehensive coverage. Almost all organisations completed the return, so the census provides an accurate picture of the NHS finance function, rather than assumptions based on sampling.

The scope of the census includes staff whose dominant role is in finance and who are professionally accountable to the finance director. This includes management accounts, financial accounts, payroll and audit, capital and finance systems, finance secretaries and personal assistants but not those working in supplies/procurement roles. Finance staff based in clinical or operational divisions but whose primary role is finance (for example, divisional accountants or payroll officers based in HR) are also included. For comparative purposes, payroll staff are included even where these staff are accountable to the HR director or other director.

We are extremely grateful to the individuals in each finance department who led the local compilation of data and enabled the HFMA to collect the national data sets.

## Introduction

**This briefing summarises the 2015 NHS finance staff census results for England, Wales, Scotland and Northern Ireland and the results of the HFMA's finance staff attitudes survey, completed by a sample of NHS finance staff.**

**Separate briefings are available that set out the detailed results for England, Wales, Scotland and Northern Ireland. Care must be taken when interpreting these results. The organisational structures in place differ across the UK and the use of shared services varies between countries and organisations.**

**The aim of producing these briefings is to develop a better understanding of the make-up of the NHS finance function and how it has changed over time. The staff attitudes survey was carried out to help understand the qualifications, career path, morale and training and development needs of NHS finance staff.**

**The census data, collected in autumn 2015, reflects the number of finance staff in post at the end of June 2015. The staff attitudes data was collected in October 2015 via an online survey run by the HFMA, with a response rate of 753 finance staff from across the UK.**

## Summary of census responses

The census counted the number of NHS finance staff in post at the end of June 2015. In total we received data from 571 organisations from across the UK as shown in **Table 1**. We achieved a 99.7% response rate from the organisations approached.

### Staff in post

Each of the 571 organisations taking part in the census provided a range of data about their finance staff. We collected data on establishment, staff in post (based on whole-time equivalent number), vacancies and actual headcount. Overall, there are 19,602 finance staff working in the NHS in across the UK.

**Table 2** shows the headcount, whole-time equivalent (WTE) and vacancy data for each type of organisation. The WTE numbers differ from headcount, reflecting part-time working arrangements and that not all established posts were filled at the time of the census. This data shows that the 19,602 NHS finance staff equates to 18,206 WTE posts. There are 1,128 WTE vacancies in the UK, or 6%.

**Table 1: Survey response by organisation type**

Organisation type England (E) Wales (W) Northern Ireland (NI) Scotland (S)	Total number of organisations in each category completing the census
NHS trust/ foundation trust (E)	240
Clinical commissioning group (E)	209
Specialised commissioning (E)	10
Commissioning support unit (E)	8
Health board (W)	7
NHS trust (W)	2
Specialised services (W)	1
Health and social care trust (NI)	6
Health and social care board (NI)	1
Territorial health board (S)	13
Special health board (S)	8
Other	66
<b>Total</b>	<b>571</b>

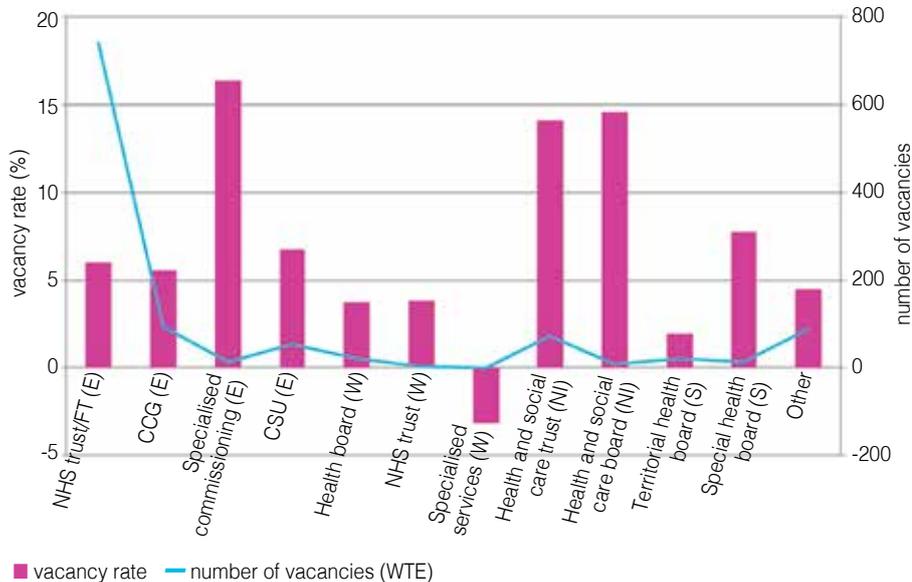
*Note: 'Other' includes the Business Services Organisation (Northern Ireland), NHS Wales Information Service, Public Health Wales, NHS Wales Shared Services Partnership (NWSSP), NHS England area teams and regional offices and non-core English NHS organisations including social enterprises, shared services, audit agencies, Health Education England, NHS Property Services, the Department of Health and Trust Development Authority*

**Table 2: Headcount and WTE data by organisation type**

Organisation	Establishm't	Staff in post	Vacancies/ over-establishm't	Vacancy rate	Head count	From agencies	Staff seconded
NHS trust/ foundation trust (E)	12,278	11,538	740	6%	12,466	576	32
Clinical commissioning group (E)	1,700	1,606	94	6%	1,704	113	13
Specialised commissioning (E)	90	75	15	16%	82	6	3
Commissioning support unit (E)	778	726	52	7%	736	71	4
Health board (W)	569	548	21	4%	577	11	0
NHS trust (W)	56	54	2	4%	59	2	1
Specialised services (W)	12	12	0	-3%	12	0	1
Health and social care trust (NI)	519	446	73	14%	567	7	1
Health and social care board (NI)	52	44	8	15%	45	0	0
Territorial health board (S)	1,137	1,115	22	2%	1,215	5	0
Special health board (S)	172	158	13	8%	174	4	0
Other	1,973	1,884	89	5%	1,965	72	6
<b>Total</b>	<b>19,334</b>	<b>18,206</b>	<b>1,128</b>	<b>6%</b>	<b>19,602</b>	<b>867</b>	<b>61</b>

*Note: Totals may not sum due to roundings*

Chart 1: Vacancy rate and vacancy numbers by organisation type



As would be expected, most finance vacancies are in English NHS trusts and foundation trusts (740 WTE).

**Chart 1** shows the range of vacancy rates in different organisations. The vacancy rate ranges between less than zero in Welsh specialised services (there are more WTE employees than established posts) and 16% in English specialised commissioning.

Analysing data (excluding 'other' organisations) for each country shows that Northern Ireland has a high vacancy rate of 14%, compared with 6% in England, 4% in Wales and 3% in Scotland. The number of vacancies ranges between 0 WTE and 740 WTE.

#### **Organisational level analysis and average staffing levels**

In this section we use the census data to analyse the number of staff in post in more detail. **Table 3** shows that the organisations with the largest finance teams are English commissioning support units, health and social care trusts in Northern Ireland and Scottish territorial health boards. The majority of finance staff are employed by English NHS trusts and foundation trusts.

Table 3: Average headcount by sector

Organisation type	Number of bodies, 2015	Staff in post headcount, 2015	Average staff in post, 2015	Turnover, £m	Average staff per £m turnover
NHS trust/foundation trust (E)	240	12,466	52	73,819	17
Clinical commissioning group (E)	209	1,704	8	68,437	2
Specialised commissioning (E)	10	82	8	13,251	1
Commissioning support unit (E)	8	736	92	617	119
Health board (W)	7	577	82	6,348	9
NHS trust (W)	2	59	30	267	22
Specialised services (W)	1	12	12	634	2
Health and social care trust (NI)	6	567	95	3,659	15
Health and social care board (NI)	1	45	45	4,471	1
Territorial health board (S)	13	1,215	93	9,500	13
Special health board (S)	8	174	22	1,584	11
Other	66	1,965	30	170,297	1

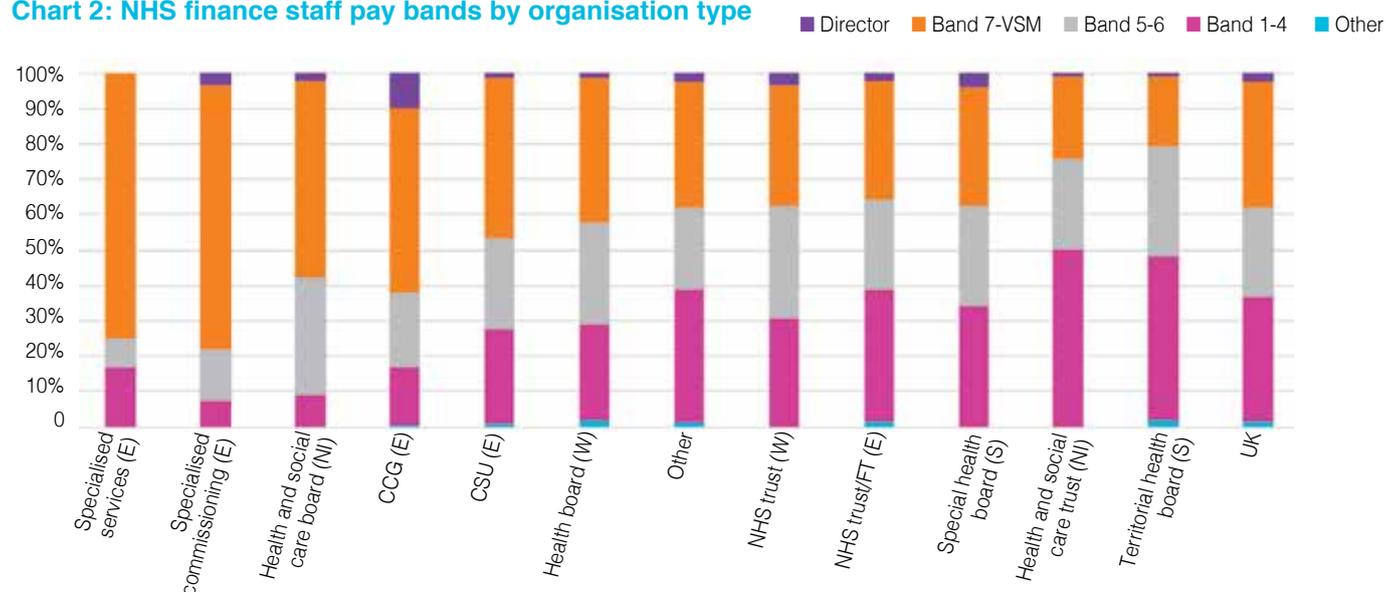
**Table 4: Health and social care trust staff numbers by turnover**

Turnover band	NHS trust/FT (E)			CCG (E)			Health board (W)		
	Number of orgs	Staff total	Avg staff	Number of orgs	Staff total	Avg staff	Number of orgs	Staff total	Avg staff
£0 - < £500m	210	9,218	44	143	1,168	8	1	24	24
£500m - <£750m	17	1,614	95	26	302	12	2	123	62
£750m - < £1,000m	7	814	116	4	82	21	0	0	0
£1,000m - < £1,250m	4	498	125	2	63	32	3	299	100
£1,250m+	2	322	161	2	89	45	1	131	131
<b>Total</b>	<b>240</b>	<b>12,466</b>	<b>52</b>	<b>177</b>	<b>1,704</b>	<b>10</b>	<b>7</b>	<b>577</b>	<b>82</b>

Turnover band	Territorial health board (S)			Health and social care trust (NI)		
	Number of orgs	Staff total	Average staff	Number of orgs	Staff total	Average staff
£0 - < £500m	5	123	25	1	14	14
£500m - <£750m	4	383	96	4	396	99
£750m - < £1,000m	0	0	0	0	0	0
£1,000m - < £1,250m	2	208	104	0	0	0
£1,250m+	2	501	251	1	157	157
<b>Total</b>	<b>13</b>	<b>1,215</b>	<b>93</b>	<b>6</b>	<b>567</b>	<b>95</b>

Note: The total number of CCGs is recorded as 177 because some CCGs share finance teams or a chief finance officer. The combined turnover for these organisations is included in the turnover figure for the single CCG completing the census return on behalf of all the organisations

**Chart 2: NHS finance staff pay bands by organisation type**

**Table 4** provides further detail on the size of the core NHS organisations in each of the four countries of the UK. The number of finance staff is driven mainly by organisational turnover and the data shows how the average number of finance staff increases in line with turnover.

#### **NHS finance staff by pay band**

The census data also covers the numbers of NHS finance staff in each pay band. **Chart 2** analyses the data by organisational type. At the left-hand side are the organisations with the highest proportion of staff in the band 7 to VSM grouping. In the UK

**Table 5: Analysis of principal functions of NHS staff**

Organisation type	Financial management	Financial accounting	Financial services	Admin and secretarial
NHS trust/FT (E)	49%	28%	21%	2%
CCG (E)	76%	16%	3%	5%
Specialised commissioning (E)	90%	3%	1%	6%
CSU (E)	52%	42%	3%	3%
Health board (W)	66%	21%	10%	3%
NHS trust (W)	65%	23%	11%	2%
Specialised services (W)	75%	25%	0%	0%
Health and social care trust (NI)	43%	40%	15%	2%
Health and social care board (NI)	89%	9%	0%	2%
Territorial health board (S)	39%	24%	36%	2%
Special health board (S)	43%	34%	21%	2%
Other	40%	17%	33%	9%
<b>Total</b>	<b>50%</b>	<b>26%</b>	<b>20%</b>	<b>3%</b>

**Box 2: Definition of principal functions**

NHS finance staff carry out a wide range of functions. These definitions capture a broad category for individual staff with several different roles:

- **Financial management** – financial planning, management accounts, performance, commissioning, costing, contracting
- **Financial accounting** – accounts payable, accounts receivable, treasury
- **Financial services** – audit, payroll, financial systems, projects.

35% of finance staff are paid at band 7 to VSM but this varies between 75% in specialised services and 20% in Scottish territorial health boards.

**NHS finance staff by functional role and qualification**

NHS finance staff normally work in distinct functional roles within the finance team. Some organisations need to employ finance staff across a range of disciplines while others are more specialised. Organisations that have traditionally employed a diverse range of staff are increasingly outsourcing some of the roles to organisations specialising in back-office and support functions.

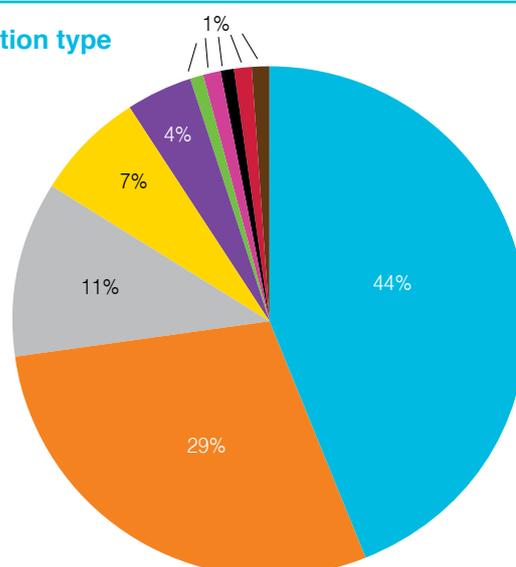
The majority of finance staff in the UK work in financial management roles (50%) – 26% of staff work in financial accounting roles, 20% in financial services and the remaining 3% in administration and secretarial roles. There are large variations in the proportions of finance staff employed in each type of role in different sectors of the UK NHS. Full details are shown in **Table 5**.

Census data analysed in **Chart 3** shows the majority of finance staff in the UK (56%) have or are studying for a formal finance qualification.

**Chart 3: Analysis of qualification type for NHS finance staff**

- Not qualified or studying
- CCAB/CIMA qualified
- CCAB/CIMA student
- AAT qualified
- AAT student

Groups representing 1% of respondents or fewer – other qualified (303), NVQ qualified (304), payroll qualified (149), other student (109) and other (148 – includes audit qualified, NVQ student, payroll student, audit student, CAT qualified and CAT student)



**Table 6: Analysis of qualifications by country**

	Not qualified or studying	CCAB/ CIMA qualified	CCAB/ CIMA student	AAT qualified	AAT student	NVQ qualified	Other qualified	Payroll qualified	Other student	Other	Total
England	39%	31%	13%	8%	4%	1%	1%	1%	1%	1%	100%
Wales	51%	28%	7%	10%	3%	0%	0%	0%	0%	2%	100%
Scotland	67%	14%	6%	1%	1%	4%	4%	1%	0%	1%	100%
Northern Ireland	72%	17%	4%	4%	1%	0%	2%	0%	0%	0%	100%
<b>UK total</b>	<b>44%</b>	<b>29%</b>	<b>11%</b>	<b>7%</b>	<b>4%</b>	<b>2%</b>	<b>2%</b>	<b>1%</b>	<b>1%</b>	<b>1%</b>	<b>100%</b>

Analysing the data in more detail, 40% have or are studying for a CCAB or equivalent-body qualification, while 44% of finance staff are not qualified or studying.

Of the 7,938 CCAB- or equivalent body-qualified or studying staff, almost half (45%) are CIMA-qualified or studying, 33% are CIMA-qualified or studying, 14% CIPFA, 7% ICAEW/ ICAS/ ICAI and 1% have other qualifications (including non-UK qualifications).

Further analysis of the data shows

that there is a wide variation in the proportions of qualified finance staff in each country. **Table 6** shows the details.

**NHS finance staff by gender**

**Chart 4** shows there is a large imbalance between the pay of male and female finance staff. Women make up 63% of the NHS finance staff headcount in the UK but are outnumbered by men at director level. Only 28% of finance directors are female and women only make up 50% of the finance workforce in band 7 to VSM pay band roles.

**Chart 4: NHS finance staff by gender at each pay grade**

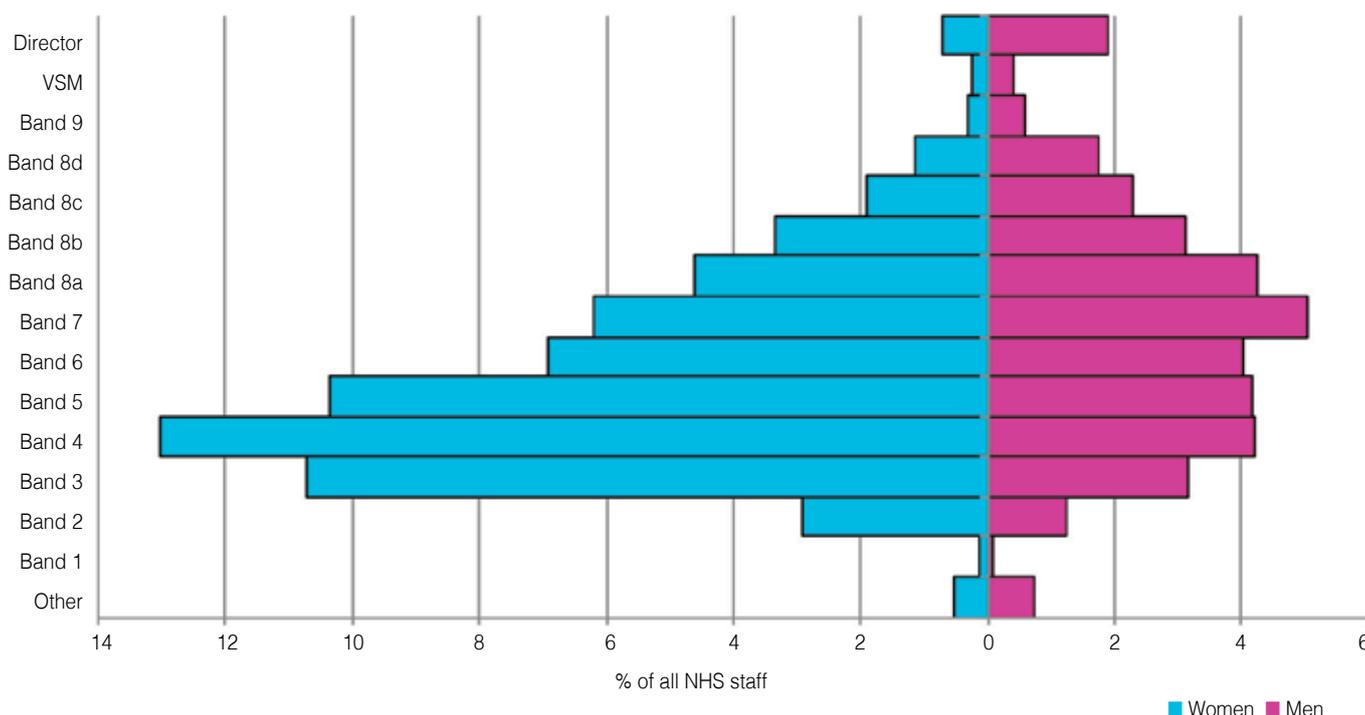


Table 7: NHS finance staff gender by organisation

	ENGLAND				WALES		
	NHS trust/FT	CCG	Specialised commissioning	CSU	Health board	NHS trust	Specialised services
Staff in post headcount	12,466	1,704	82	19,602	577	59	12
Male staff as % of all staff	36%	43%	43%	37%	38%	37%	33%
Female staff as % of all staff	64%	57%	57%	63%	62%	63%	67%
Male directors as % of all directors	79%	67%	100%	72%	71%	50%	0%
Female directors as % of all directors	21%	33%	0%	28%	29%	50%	0%
Male band 7 to VSM staff as % of all band 7 to VSM	50%	46%	46%	49%	52%	50%	33%
Female band 7 to VSM staff as % of all band 7 to VSM	50%	54%	54%	51%	48%	50%	67%
Male band 6 and below staff as % of all band 6 and below	28%	32%	22%	28%	27%	30%	33%
Female band 6 and below staff as % of all band 6 and below	72%	68%	78%	72%	73%	70%	67%

	NORTHERN IRELAND		SCOTLAND			
	Health and social care trust	Health and social care board	Territorial health board	Special health board	Other	National
Staff in post headcount	567	45	1,215	174	1,965	19,602
Male staff as % of all staff	26%	44%	28%	35%	42%	37%
Female staff as % of all staff	74%	56%	72%	65%	58%	63%
Male directors as % of all directors	67%	100%	42%	29%	75%	72%
Female directors as % of all directors	33%	0%	58%	71%	25%	28%
Male band 7 to VSM staff as % of all band 7 to VSM	39%	52%	49%	53%	51%	49%
Female band 7 to VSM staff as % of all band 7 to VSM	61%	48%	51%	47%	49%	51%
Male band 6 and below staff as % of all band 6 and below	22%	32%	22%	26%	35%	28%
Female band 6 and below staff as % of all band 6 and below	78%	68%	78%	74%	65%	72%

**Table 7** provides some additional data, which highlights the gender imbalance at each pay grade by organisation.

The proportions vary between sectors and countries but in general, female staff are outnumbered by male staff in senior positions.

However, in Scotland 63% of finance directors are female (and 71% of all finance staff in Scotland are female), in marked contrast to the

national trend. The HFMA organised a roundtable discussion in November 2015 discussing the gender imbalance at finance director level – see *Healthcare Finance*, December 2015, ‘Women Leaders in Health’.

## NHS finance staff attitudes: survey analysis

In this section we analyse the data from the HFMA's 2015 survey of NHS finance staff attitudes, a separate piece of work to the finance staff census. The HFMA collected data for this major UK survey during October 2015 to help build a comprehensive picture of the training and development, career path, values and perceptions of NHS finance staff.

The survey was open to all CCAB- or equivalent body-qualified NHS finance staff and those studying for a qualification across England, Wales, Scotland and Northern Ireland. This report analyses the UK-wide responses, but analysis of responses for the individual countries can be found in our country-specific briefings. This is the second such survey the HFMA has carried out.

### Who responded to the survey?

We received 753 responses to the survey, which represents 9% of the total qualified headcount of 7,938 UK finance staff. A total of 532 (71%) of the responses came from HFMA members. **Chart 5** shows there was a balance of male and female respondents as well as representation across age groups. Some 52% of respondents were female, slightly less than the proportion of women working in NHS finance overall.

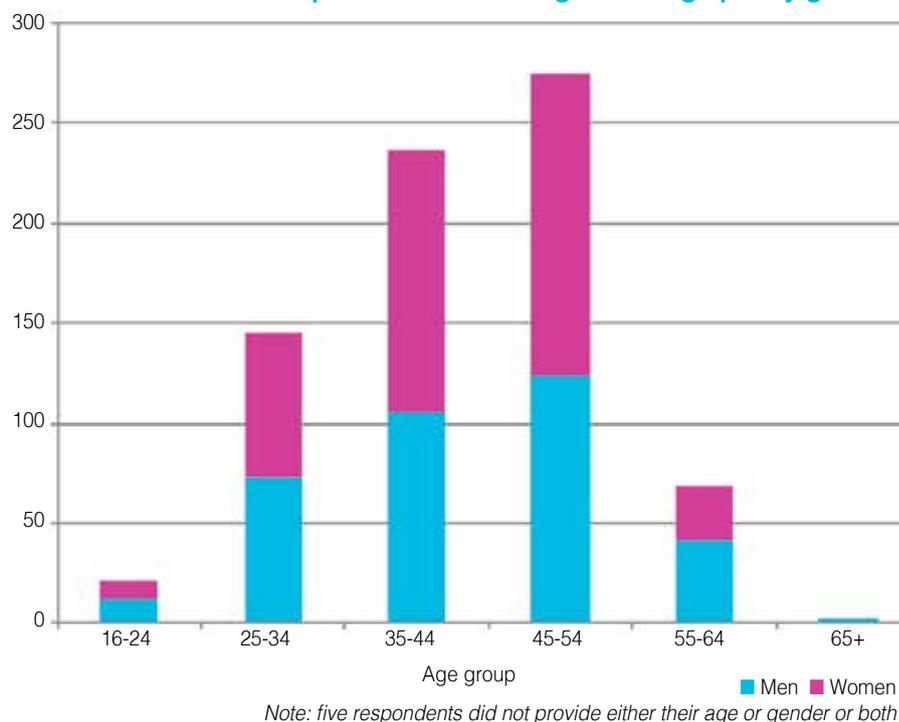
### Qualification

Respondents told us their CCAB or equivalent body finance qualification, which are largely in proportion to the census data on qualification. CIPFA-qualified respondents are slightly over-represented in the survey, CIMA and ACCA respondents slightly under-represented (see **Table 8**).

### Organisation

Respondents work for organisations from across the UK, 90% of respondents full-time and 10% part-time. **Table 9** shows there was a range of respondents at each pay band, although the band 6 and below grouping was under-represented and the higher pay bands were over-represented.

**Chart 5 : Number of respondents in each age banding split by gender**



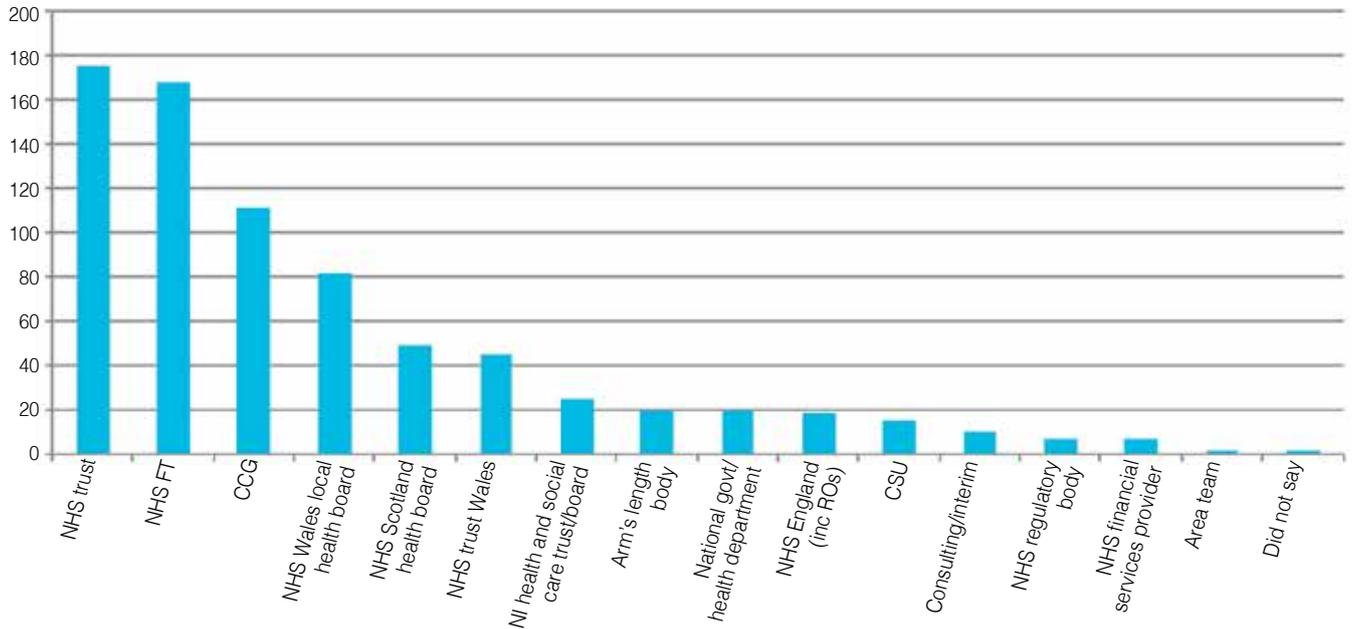
**Table 8: Survey respondents' qualifications**

Qualification	Number of respondents	Percentage
CIMA	287	38%
ACCA	217	29%
CIPFA	186	25%
ICAEW/ICAS/ICAI	62	8%

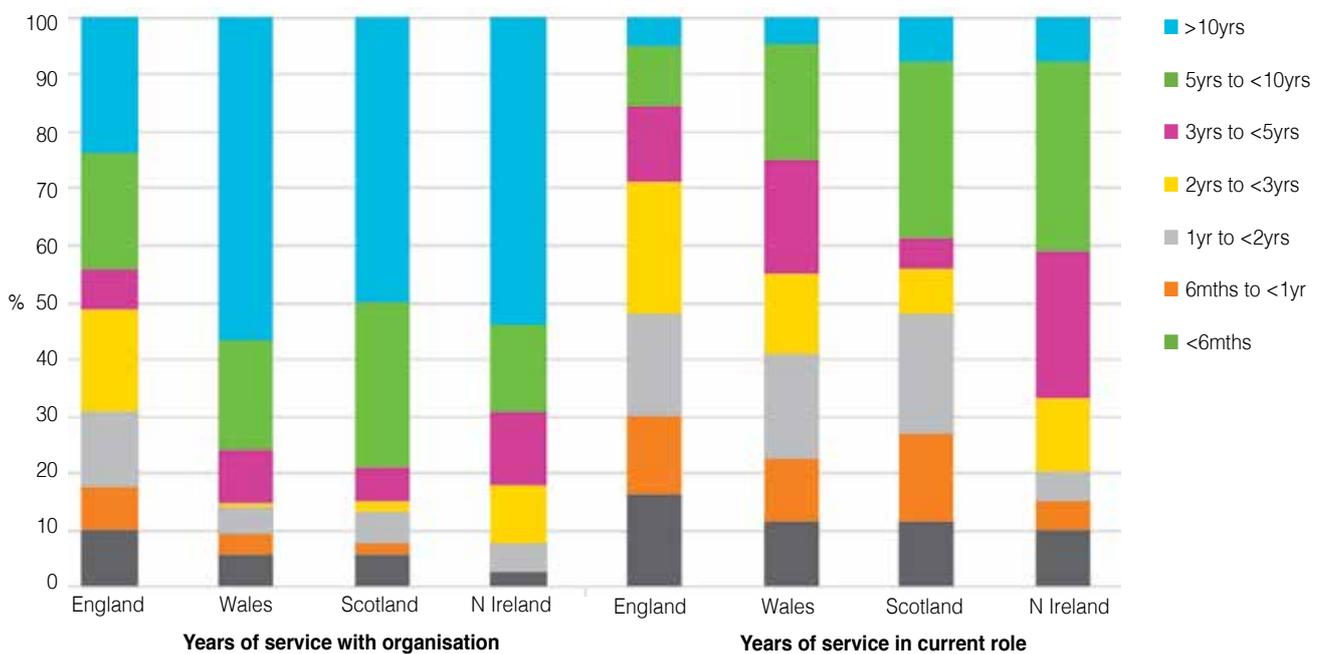
**Table 9: Survey respondents by pay band**

Pay band	Count	Percentage
AfC3	8	1%
AfC4	22	3%
AfC5	47	6%
AfC6	62	8%
AfC7	97	13%
AfC8a	127	17%
AfC8b	107	14%
AfC8c	80	11%
AfC8d	76	10%
AfC9	30	4%
Local contract (above AfC pay range)	40	5%
Very senior managers pay framework (VSM)	44	6%
Did not say	13	2%
<b>Total</b>	<b>753</b>	<b>100%</b>

**Chart 6: Responses by sector**



**Chart 7: Length of service with organisation and in current role**



**Chart 6** shows which organisations respondents work for – mostly for English NHS trusts, FTs and CCGs. While there is representation from across the UK, the response from Scotland and Northern Ireland was relatively low, so these two nations’ results should be treated with caution.

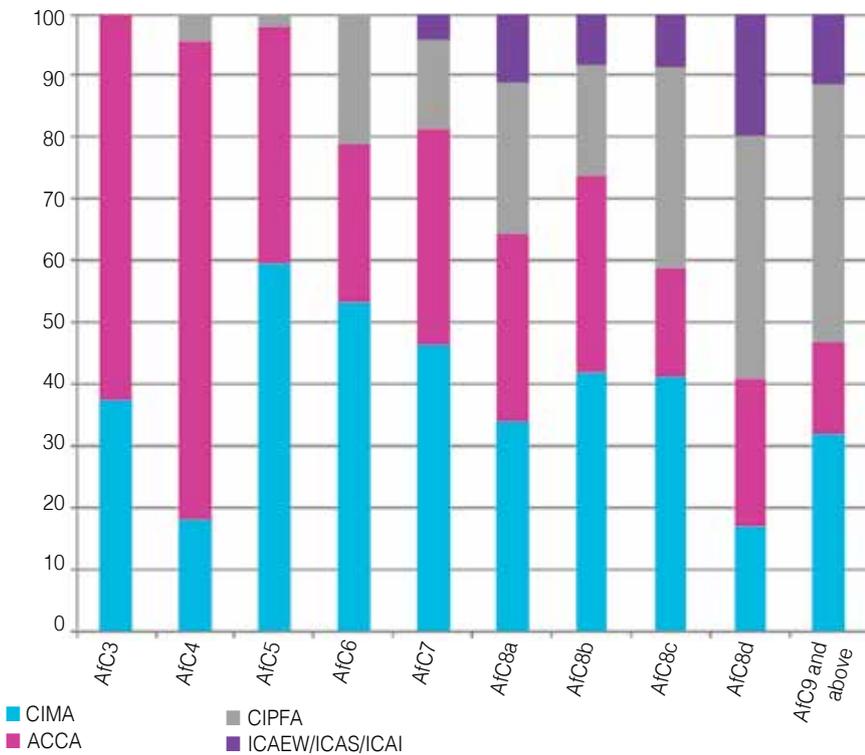
**Career path and training**

The purpose of the survey was to understand the detail of NHS finance

staff career paths, training and motivation. **Chart 7** gives a picture of how long respondents have worked for their organisations and in their current roles. The most common length of service organisations is 10 years or more, ranging from 24% of English respondents to between 50% and 57% in the rest of the UK.

In England the most common length of service in respondents’ current

**Chart 8: Qualifications at each pay band**



*Pay band data shows that those working in roles at lower pay bands tend to be more likely to have spent their entire career in the NHS*

roles is between two and three years, compared with between five and 10 years in the rest of the UK.

**Training**

**Chart 8** demonstrates the range of qualifications held or being studied for at each pay band. More senior staff tend to have the CIPFA qualification, whereas those at more junior levels are ACCA- or CIMA-qualified or studying.

**Employment and pay**

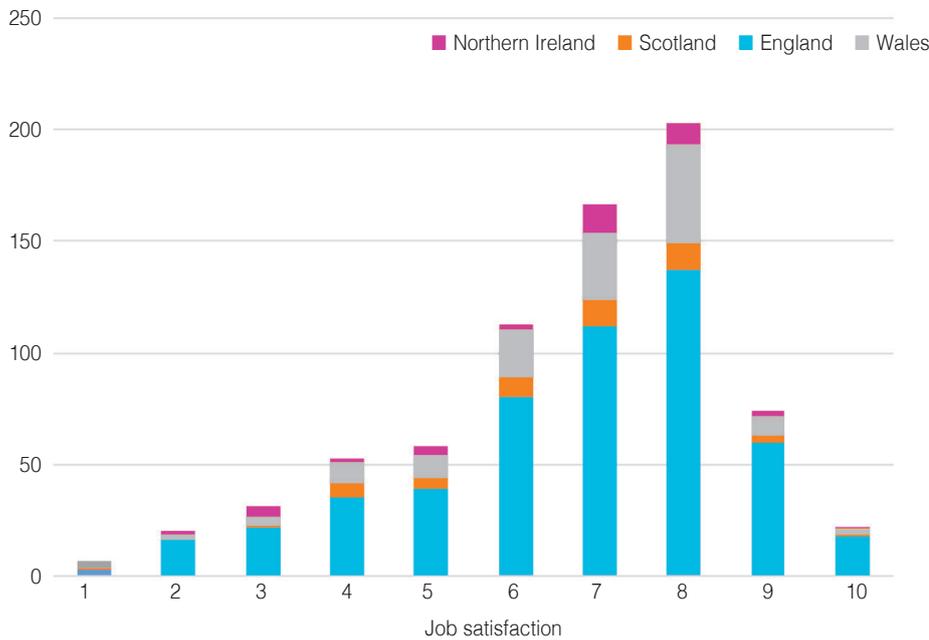
We asked respondents to tell us about their career to date. Overall, 35% had spent their entire career in an NHS finance role. Of these staff, 32% had qualified in 2010 or more recently. Pay band data shows that those working in roles at lower pay bands tend to be more likely to have spent their entire career in the NHS.

**Table 10: Analysis of work experience**

	Number	Percentage
Entire career spent in NHS	8	21%
Experience from outside NHS	31	79%
<b>Type of non-NHS experience</b>		
Local government	2	5%
Central government	4	10%
Other public sector	7	18%
Charity sector	2	5%
Private sector – accountancy firm	14	36%
Private sector – services sector	6	15%
Private sector – retail	1	3%
Private sector – manufacturing/ industry	15	38%
Private sector – other	1	3%

**Table 10** provides details about the types of non-NHS experience that NHS finance staff have brought to their current roles. The table shows the number of respondents who have worked in each sector. Some respondents may have worked in more than one sector.

**Chart 9: Job satisfaction in numbers**



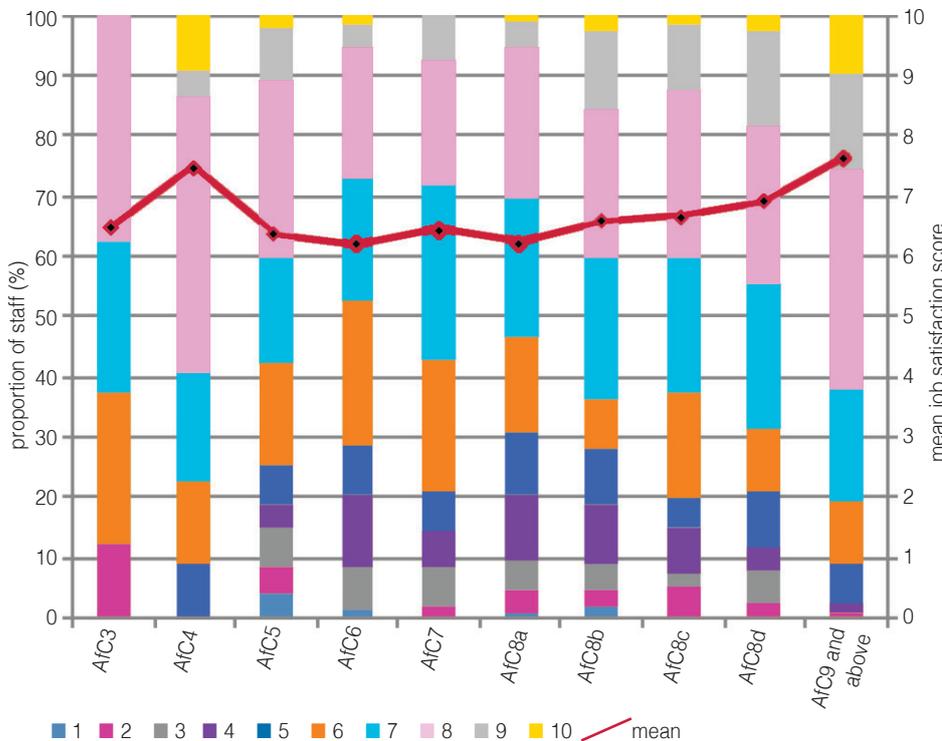
in Scotland is the lowest at 6.4, rising to 6.5 in Northern Ireland, 6.6 in Wales and 6.7 in England.

**Chart 10** shows how job satisfaction varies as staff become more senior, in a higher pay band. Job satisfaction tends to increase with seniority but is not necessarily derived from the higher pay alone and is likely to be related to greater scope to manage their workload and pursue more interesting aspects of the job.

The 74 respondents who felt insecure about their job and were concerned about losing their job in the next 12 months reported mean job satisfaction of 5.7, compared with 7.0 for those who felt very secure about their job.

Asked how their job satisfaction might change over the next 12 months, 17% said they feel it will worsen, 54% that it will stay the same and 30% that their job satisfaction will improve. This varied regionally – 37% in Scotland expect job satisfaction to improve, compared with 18% in Northern Ireland (72% of respondents expect it to stay the same), 29% in England and 33% in Wales.

**Chart 10: Job satisfaction at each pay band**



Some 63% of respondents would like to spend the rest of their career in the NHS but 10% would not and 27% are unsure. Only 49% expect they will be able to remain employed by the NHS, 15% do not expect to spend the rest of their career in the NHS and 37% do not know, suggesting a degree of uncertainty among NHS finance staff about job security. These figures are fairly consistent across most of the UK, with 64% of respondents in England, Wales and Scotland wanting to spend the rest of their careers in the NHS. In Northern Ireland, only 45% want to remain in the NHS.

**Development and career plans**

We asked respondents to tell us about their job satisfaction level. **Chart 9** shows that job satisfaction is positively skewed towards high job satisfaction. The mean job satisfaction is 6.7 out of 10. Further analysis shows mean job satisfaction

Asked about job security, 50% reported said they feel ‘very secure’ in their current role, with 40% concerned about losing their job in the next few years and 10% about losing their job in the next 12 months. This varied across the UK. In England only 41% of respondents reported feeling very

**Table 11: Frequency working additional hours, by pay band**

	Never	Rarely (once or twice a month)	Frequently (once or twice a week)	Often (at least three times a week)	Always	Total
UK average	5%	26%	25%	20%	25%	100%
England average	4%	22%	26%	22%	27%	100%
Wales average	6%	36%	25%	11%	21%	100%
Scotland average	13%	31%	13%	23%	21%	100%
Northern Ireland average	3%	37%	37%	11%	11%	100%

secure, compared with 74% in Wales. While 13% of respondents in England are concerned about losing their job in the next 12 months, 8% are concerned in Northern Ireland, 1% in Wales and none in Scotland.

In spite of concerns about job security and satisfaction, only 9% of respondents are looking for a new job and are very keen to move. A further 18% are looking for a new job but are in no desperate hurry, while 36% would only move jobs if the ideal position came up. Another 37% are not looking at all. In Northern Ireland 5% of respondents are looking for a new job, rising to 10% in England.

#### **Working hours**

Asked about working hours, 45% of respondents told us they regularly work excess hours, with 25% saying they 'always' work in excess of their contracted hours and a further 20% that they 'often' (at least three times a week) work additional hours. While 25% said they work extra hours once or twice a week, 26% do so once or twice a month and 5% of staff never work in excess of

contracted hours. There is a wide variation between nations. In England 49% of respondents reported always or often working excess hours, compared with 44% in Scotland, 32% in Wales and 22% in Northern Ireland.

In general, those working extra hours are more senior finance staff. Those at pay band 8b or above are much more likely to report 'always' working in excess of their contracted hours. **Table 11** shows how often respondents work additional hours.

Those who work additional hours more often also report working the most extra hours. This suggests there is a minority of staff who regularly work significantly in excess of their contracted working hours rather than extra hours being worked by finance staff responding to one-off pressures.

**Table 12** shows how many extra hours are worked by those staff working additional hours 'always' or 'often'. Most finance staff (55%) work up to five extra hours per week, or between five and 10 hours, when they do work additional hours.

**Table 12: Additional hours worked per week at each pay band**

	No extra hours	Up to and including five extra hours	More than five hours but less than 10	More than 10 hours but less than 15	More than 15 hours but less than 20	Total
UK average	16%	39%	29%	12%	4%	100%
England average	12%	39%	32%	12%	4%	100%
Wales average	28%	43%	18%	10%	3%	100%
Scotland average	38%	33%	14%	10%	5%	100%
Northern Ireland average	13%	13%	63%	13%	0%	100%

**Table 13: Career development opportunities**

	What development opportunities have you had through work in the past 12 months?	What kind of development opportunities would you like to have?
Local/ national conferences	63%	44%
Additional responsibilities/on-the-job training	56%	53%
Local/national courses	56%	50%
E-learning	52%	34%
Webinar	51%	30%
In-house training sessions	50%	37%
Networking events/opportunities	46%	44%
National/ local policy groups (such as Department of Health or HFMA committees)	21%	30%

The amount of additional hours worked varies between nations. Finance staff in England and Northern Ireland reported working the most additional hours, although the number of respondents in Northern Ireland was relatively low, which may affect the results.

#### **Career development**

Some 69% of respondents feel NHS finance offers enough opportunities for motivated finance professionals to progress their careers and 76% believe they have been given adequate development opportunities in their current role.

Some noted that in their local areas career progression is limited. In Scotland and Northern Ireland only 49% and 50% of respondents felt there were enough opportunities for motivated finance professionals, compared with 61% in Wales and 74% in England.

Similarly, 67% of respondents in Scotland and 70% in Northern Ireland felt they had sufficient development opportunities, compared with 74% in Wales and 78% in England.

**Table 13** details the development opportunities respondents have had in the past 12 months and the opportunities they would like. There are discrepancies. Some

opportunities are not the ones respondents would like. In general, however, only the opportunity to attend local or national policy groups is something more that staff would like to do than they have had the opportunity to.

#### **Values and perceptions**

Among respondents, 89% feel their finance department provides value to their organisation but 11% do not. There was a wide range of responses between nations, from 77% of Scottish respondents who feel their finance department provides value to 95% in Wales. Northern Ireland and England respondents reported 87% and 89% respectively.

Asked what would most improve the value added by the finance team, the main choices among respondents were 'better communication between finance and non-finance staff' (60%), 'improving finance staff knowledge of the business' (60%) and 'improving the financial literacy of non-finance staff' (59%). This was consistent across the UK.

In Wales, however, 45% of respondents also highlighted 'access to better data', as did 53% in England, while in Scotland 63% of respondents chose 'better finance reporting'.

We also asked respondents to tell us about whether they themselves feel valued and by whom. **Table 14** shows that the majority of finance staff (80%) do feel valued by their line managers but are less sure about other groups. In particular, very few finance staff could say they feel valued by the public or patients.

#### Comparison with private sector

We asked respondents about how they felt the working environment and terms and conditions in NHS finance teams would compare with those in a similar role in the private sector.

**Table 15** shows the results – 66% of finance staff (ranging between 59% in Wales and 68% in England) believe the salary and financial rewards available in the private sector would be better than in the NHS, while 51% (ranging between 44% in Wales and

69% in Northern Ireland) believe the status attached to such a job would be better in the private sector.

However, respondents feel that factors such as stress, working hours, job security and work-life balance in the private sector would not be better than in the NHS.

Job security and the NHS pension scheme are seen by the majority of respondents as being better in the NHS. Finally, respondents who felt that professional fulfilment would be better in the private sector ranged from 19% in England, 23% in Wales, 32% in Scotland and 47% in Northern Ireland.

*Job security and the NHS pension scheme are seen by the majority of respondents as being better in the NHS*

**Table 14: As a finance professional, do you feel valued by...?**

	Your line manager	Your organisation's board	Clinicians in your organisation	National government – health department	Public	Patients
Yes – very much	39%	12%	7%	1%	0%	0%
Yes – more often than not	41%	32%	34%	10%	4%	4%
Neutral – cannot tell	12%	41%	41%	50%	51%	57%
No – not often	7%	9%	11%	21%	24%	19%
No – not at all	2%	6%	6%	17%	21%	20%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

**Table 15: Perceptions about the private sector**

	Better in the private sector	About the same	Better in the public sector
Salary and financial rewards	66%	22%	13%
Pension scheme	3%	9%	88%
Professional fulfilment	22%	40%	38%
Status (value attached to role by public/friends/work colleagues)	51%	38%	11%
Stress	16%	51%	34%
Working hours	13%	41%	46%
Job security	5%	30%	65%
Work-life balance	11%	38%	51%

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*59% of respondents said the work-life balance is a motivational factor for them and 56% selected the enhance job security*

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### **Motivation for working in the NHS**

We asked respondents to tell us specifically what motivates them to work in the NHS. For the majority (69%) it is the public sector values of the NHS and its employees, while 58% say it is the opportunity to improve patient care and 55% say it is the good pension and leave benefits offered in the NHS.

Just 9% of respondents said that being held in high esteem by others is a factor. These figures were consistent across England, Wales and Scotland.

In Northern Ireland there are another set of motivations. For the majority in Northern Ireland (67%) it is the good pension and leave benefits offered in the NHS.

In addition, 59% said the work-life balance is a motivational factor for them and 56% selected the enhance job security. Only 49% chose public sector values and 36% chose improving patient care.

## **Conclusion**

**This is the first census of UK NHS finance staff and survey of staff attitudes focusing on the UK as a whole. It highlights the diverse nature and skills of finance staff but also the desire for development opportunities and career progression.**

**The NHS is facing financial constraints but finance staff continue to work to provide value to their organisations, working additional hours when required.**

**Finance staff have a high job satisfaction on average and are clear about the reasons they work in the NHS, with the majority keen to spend their careers in roles they see as providing good opportunities for motivated staff.**

**The HFMA will be using the data from the census and survey to continue to support members and all NHS finance staff by providing high-quality training and development opportunities.**

This briefing was written by Richard Edwards, independent consultant, under the direction of Emma Knowles, HFMA head of policy and research.

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