



HEALTHCARE MANAGEMENT TRUST

Unit 1 Langdon House, Langdon Road, Swansea SA1 8QY
Telephone: 020 7222 1177 Email: admin@hmt-uk.org
www.hmt-uk.org

Job Title	Head of Finance
Department	Finance
Reports to (job title)	Director of Finance
Direct and Indirect Reports	Yes
Job Grade	Band E

Who we are

At the Healthcare Management Trust, we are obsessed with achieving our **Vision**, *“to be the most innovative and best quality provider of niche health and social care services.”*

Our **Purpose** is, *“to make every contact count, ensuring every resident and patient receives the best possible experience and outcome.*

We aim to provide services which value collaboration and place our residents, patients and people at the heart of all we do. We will always do the right thing for our residents, patients and people.

We will be outwardly connected to the most innovative practices and service offerings in the market. We will do things differently and will be bold with our ambition to change things for the better.

We are passionate about what we do and so are our people. Bringing their most authentic selves to work and seeking joy and fun in what we do.

We will deliver care and clinical interactions compassionately and tailor them to individual needs.”

We achieve this by living our business **Values** each and every day:

- We are **caring**
- We are **enterprising**
- We are **resourceful**
- We are **authentic**
- We are **accountable**

As a result, we are able to give back to the people and communities we serve by delivering on our **Charitable Mission** to, *“Provide quality and innovative care solutions to those with complex needs within marginalized community settings.”*



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What you'll be doing (your job purpose)

As Head of Finance, you will lead the financial strategy and operations of the organisation, ensuring strong financial performance, compliance, and long-term sustainability. You'll oversee budgeting, forecasting, reporting, and financial controls while providing strategic insights to support business decisions. Acting as a key partner to the leadership team, you'll drive growth, efficiency, and financial integrity across the organisation.

Your key accountabilities and responsibilities

Role Responsibilities

- Lead the year-end process, including the preparation of the annual statutory accounts and other regulatory returns, ensuring full compliance with the Charities SORP and relevant accounting standards.
- Maintain the integrity of the organisations financial systems, ensuring robust internal controls are in place and that all Finance Policies remain current, compliant, and consistently applied across the organisation.
- Oversee the monthly financial close process in partnership with the Group Financial Controller, ensuring accuracy, completeness, and adherence to reporting timelines.
- Produce and present monthly management accounts and supporting financial packs for all sites and Head Office, conducting financial review meetings with senior management.
- Calculate and monitor HSBC Financial Covenant Ratios, promptly identifying and escalating any areas of concern to the Director of Finance.
- Collaborate with the Director of Finance in preparing the monthly financial report pack for the Board of Trustees and the Executive Team.
- Ensure timely and accurate submission of all statutory and financial returns, including pension and VAT filings, in accordance with regulatory deadlines.
- Manage the organisation's cash flow, monitoring liquidity and ensuring the efficient use of financial resources.
- Lead the annual budgeting process, alongside the FP&A Manager, developing robust models and methodologies that enable bottom-up budget construction and ensure engagement and ownership from key stakeholders.
- Work closely with HR to develop and maintain the Staff Establishment Budget, ensuring accurate alignment of roles, hours, and associated costs.
- Oversee the maintenance of the chart of accounts, ensuring it remains fit for purpose and supports accurate financial reporting.
- Lead, mentor, and develop the senior finance team, ensuring consistent financial support and commercial insight across all sites.
- Support the external audit process in collaboration with the Group Financial Controller, maintaining positive relationships with auditors, providing required documentation, and ensuring timely resolution of audit points.

Date



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- Provide leadership across the wider Finance team, fostering a culture of continuous improvement, accountability, and professional development.
- Act as a key contributor in shaping company-wide financial strategy, ensuring alignment with operational and commercial objectives.
- Act as the primary point of contact with the company's insurance provider, overseeing all insurance-related matters and coordinating with relevant internal departments to manage and process any claims efficiently.
- Act as Deputy to the Director of Finance, assuming leadership responsibilities as required in their absence.

General Responsibilities

- To be responsible for the health, safety and welfare of yourself and others whilst at work, including colleagues, residents and visitors to the Home and for alerting the officers responsible to any hazards or potential risks to health and safety.
- To be fully conversant with the HMT policies relating to Safeguarding of Vulnerable Adults and Whistleblowing.
- To ensure compliance with the HMT Information Governance Policy, maintaining an appropriate level of confidentiality around issues that may be personal or commercially sensitive.
- Establishing and maintaining positive working relationships both with colleagues, residents, visitors and other health professionals and agencies.
- To act as an ambassador for the HMT company Vision and Values.
- To promote equality and diversity at all times and across all work activities.
- To adhere to HMT policies and procedures.
- Attend mandatory training days / courses, on or off site, as and when required
- To undertake any other duties and accountabilities which would be lawful, reasonable and appropriate to the role.

Your knowledge, skills and experience	
Significant post-qualification (6+ years) experience in a senior financial role,	Essential
Experience within the healthcare or not-for-profit sector.	Desirable
High level of computer literacy, including a proficient use of accounting software and report writing.	Essential
Excellent leadership, interpersonal, and stakeholder management skills.	Essential
Must be able to work collaboratively with a wide range of staff.	Essential
Effective communication skills.	Essential
Approachable, and calm under pressure. Able to prioritise effectively and manage conflict and competing interest groups.	Essential
Strong commercial awareness and strategic thinking	Essential
Ability to identify and solve problems and think creatively.	Essential

Date Choose an item.



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A sound knowledge of accounting principles and best practice.	Essential
Good verbal, written and numerical skills.	Essential

Your training and qualifications	
ACCA qualified Accountant	Essential
Advanced Excel skills and experience with finance systems	Essential

The way we do things at HMT (our Behaviours)
<i>*See Appendix 1 attached</i>

This job description provides an outline of the role, detailing the main responsibilities and tasks the post holder may be required to undertake. It is not exhaustive, and the post holder may be required to carry out other duties as reasonably requested. The job description may also be updated from time to time to reflect the changing needs of the business

All staff are required to comply with the organisation's policies, procedures, and standards at all times, participating in mandatory and role-specific training, supervision, and appraisal processes. Staff are expected to uphold a professional approach to work, demonstrating respect, integrity, and accountability in all interactions, and to contribute to a safe environment for patients, residents, colleagues, and visitors in line with Health & Safety regulations. Staff have a duty to safeguard and promote the welfare of vulnerable adults and children, raise concerns in accordance with statutory and organisational procedures, and support the principles of Equality, Diversity, and Inclusion. Confidentiality must be maintained at all times, and information handled in accordance with GDPR and organisational requirements.

Staff are also expected to be flexible, undertaking other reasonable duties within their competence to meet the needs of the service, and to contribute to continuous improvement by engaging positively with feedback and change initiatives. The wellbeing and dignity of patients and residents should remain central to all aspects of work, with staff demonstrating commitment to professional standards and the overall goals of the organisation.

Team members will be expected to carry out their duties in line with their terms and conditions and contract of employment, the standards stated in the employee handbook and Health & Safety guidelines and will be required to follow HMT policies and procedures.

I have received a copy of this Job Description; read it, understood it and agreed to it.

Signed.....

Date.....

Job Holder

Date Choose an item.