

# CLAIRE ROBERTS



The Leeds Teaching Hospitals NHS Trust is the largest in the UK and includes the largest teaching hospital in Europe. It provides high quality acute hospital services for the population of Leeds and the surrounding area and acts as a regional centre for a number of specialist services such as cancer and cardiac surgery. In total they employ over 14,000 staff across eight sites, treating around one million patients a year with a budget of £730 million. The Trust is a CIMA Training Quality Partner.

*The Vision: "We will ensure The Leeds Teaching Hospitals NHS Trust is a locally, nationally and internationally renowned centre of excellence for patient care, education and research. We will deliver this vision by ensuring we attract the best possible staff and invest in their development."*

**Claire Roberts ACMA**  
Assistant Director of Finance  
- Management Accounting

## Claire Roberts

### CIMA member

I'm an Accountancy and Finance graduate from the old Leeds Polytechnic and it was while I was there that I conducted some research with Dewsbury Health Authority on budgeting in the NHS which persuaded me I wanted a career in public sector finance. In 1990, when I graduated, they offered me a job as a trainee accountant and encouraged me to start my CIMA training as soon as possible. I had quite a lot of exemptions because of my degree so I finished all my exams within three years and then had to do my three years' practical experience. I ended up becoming an ACMA in May 1997 having been at St. James Hospital for three years.

For much of the time at Jimmy's, I was in a finance manager role, providing finance support to clinical specialties: trauma, orthopaedics and plastic surgery. I was also part of a national pilot for a project looking at the development of healthcare resource groups. It was about introducing a new approach to costing in the NHS and was great experience. The hospital underwent a lot of organisational and structural changes but I progressed through various finance roles to become Assistant Director of Finance in the largest NHS Trust in the country. Nowadays I manage a significant element of the finance staff within the Trust. We're responsible for making sure we provide the right kind of finance support, so my role has shifted to a finance with HR role.

For me, CIMA wasn't so much a choice but a necessity. Although I felt drawn to public sector finance, I also wanted a professional qualification that had a business foundation. I didn't need a huge emphasis on tax but I did want the strategic planning that the syllabus offered. For my own career development, I knew it would be very useful having that broader management focus which the other

accountancy qualifications didn't offer. I guess that was partly why I picked CIMA, because by that time I knew I didn't want to be just a number-crunching accountant. I liked the varied side of being out there, influencing decisions.

I think finance functions in the NHS have a huge part to play and not just in terms of the mainstream financial reporting. For instance, we place a lot of emphasis on being integrated in day-to-day operational activities. The finance managers who report to me are part of multi-disciplinary teams on the hospital floor. So they will be part of all kinds of debates about waiting lists, business planning, target setting and achieving as well as dealing with issues surrounding capacity. CIMA helps to make sure accountants

can offer that something extra, an added value. Although they can offer pure accounting advice they also have that rounded perspective which can contribute to well-informed clinical management decisions.

As an ACMA I'm now fully up-to-speed with CIMA's new CPD policy. The NHS

already has in place a competency-based skills framework and finance staff have a personal portfolio which is monitored and up-dated regularly. I think we're in quite a good position at this Trust to satisfy CPD requirements now. CIMA's new scheme fits very well with the 'evaluate and reflect' assessments of our professional development activities.

Just to conclude, I think it's true to say that there is a certain perception of accountants that I'm glad to say neither myself nor any of my staff match. I am a senior manager with a very large budget, making and influencing decisions which can have an absolutely critical impact on the treatment patients receive at our hospitals. That requires good business and people skills and this is where CIMA has helped a lot. ■

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