



## Personal Profile Qualifications & Contact Points

### Key Experience

- ① 30 years healthcare financial management experience and expertise, including LTFM, costing, pricing, financial planning, CIPs, budgeting and business cases.
- ① Roles included:
  - Varied healthcare finance consultancy projects since 2007
  - From 1989 to 2007 worked in large acute hospitals in roles including Assistant Director of Finance, Surgical Divisional Accountant, Diagnostics Divisional Accountant, Cost Accountant and Management Accountant.
- ① Many years of efficiency and productivity identification and analysis, including design of granular models to underpin Trust's schemes.
- ① A leading innovator in Person Level Costing (PLICS) and Service Line Reporting (SLR), including:
  - Extensive knowledge of NHS activity definitions, tariffs and Reference Costs
  - Designing creative PLICS models and dashboards to cover whole health and social care systems, including outcomes and clinical pathways, sometimes in overseas health systems that do not benefit from the data quality and depth of the NHS.
  - Mentoring, training, advice and support to costing staff and wider stakeholders.
  - Project management of PLICS implementation or enhancement.
  - Formal reporting of unit cost performance or the quality of the costing processes.
  - Using PLICS to design and cost up CIP schemes.
  - Benchmarking of unit costs.
- ① NHS Commissioning / Payment by Results.
- ① Management of Acute Clinical Services.
- ① Current Governor of Sheffield Children's Hospital NHS Foundation Trust (2019-2022)
- ① Foundation Trust Applications.
- ① UK Passport Holder.

### Qualifications & Professional Bodies

- ① FCCA (Fellow of the Chartered Association of Certified Accountants)
- ① CPFA (Chartered Public Finance Accountant)

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### Professional Profile

An exceptional enthusiastic and professional consultant with 30 years' healthcare experience both in the UK and overseas. Steve has a national reputation for moving forward best practice in the healthcare costing field and he also works extensively on efficiency and productivity aspects. Steve has spent many years working directly with clinical services, understands these well and is now supplementing this knowledge with a voluntary role as a governor in a leading children's hospital trust. Steve's experience covers all areas of financial management including long term financial models, business cases and reconfigurations. He believes strongly in leaving the client with the skills and working papers to progress with after the engagement ends.

His client list covers the full range of healthcare organisations, public or private, provider or commissioner, large or small, acute or non-acute, UK or international. Since 2007 in consultancy Steve has successfully completed over 30 projects across this range, many of them repeat clients.



## Assignments Undertaken

### Government of Gibraltar Health Authority

- ① Conduct a readiness review for Service Line Reporting and Patient Costing – 2019
- ① Design and produce a person-level costing model for 2018/19 across the whole of GHA including primary care and secondary care, showing the cost and all activities of each person from and including GP referral to eventual treatment – 2019/20
- ① Prepare a report for GHA that analyses the costs of the health system and recommends potential efficiency and productivity improvements - 2020

### Government of Jersey Health and Community Services

- ① Analysis of the PLICS system to produce a report identifying potential efficiency and transformation opportunities - 2019
- ① Produce a Long Term Costing Strategy for Health and Community Services that will build on PLICS and explore expanding PLICS into all other States of Jersey government departments as part of the One-Gov programme – 2019
- ① Advice and quality assurance to take the PLICS model forward to the 2017 financial year and then use it to be a crucial enabler for the 2019 CIP requirements – 2018
- ① Planning, tendering and then project managing a new PLICS & SLR system to cover most health and social care pathways in Jersey including acute, mental health, ambulance, community and social care. Build for the 2016 financial year – 2017.
- ① Advice regarding the private patient costing model and the full cost recovery of private diagnostic tests and investigations – 2016

### Midlands Partnership NHS Foundation Trust

- ① Report that explores the FTs readiness for PLICS in settings including mental health, community and social care – 2018
- ① Produce a Long Term Costing Strategy for the FT and provide mentoring, advice and support – 2019/20

### NHS England / Mersey Internal Audit Agency

- ① Conduct the annual QIPP assurance review for Knowsley and St Helens CCGs – 2018

### National Physical Laboratory

- ① Advice regarding cost / benefit of new systems and processes in 5-year financial model – 2017

### Middlesbrough Borough Council

- ① Design of unit costs and profitability analysis for commercial services - 2016

### North East Essex CCG

- ① Undertook a five-year forecast model based on patient level costs for all the health economy of North East Essex, as part of a wider Needs Analysis – 2015.
- ① Included work with Colchester Hospital University Foundation Trust (CHUFT)

**Southampton University Hospitals NHS Foundation Trust**

- ① Expert advice during the tender and implementation of new PLICS system – 2015/16
- ① Prepared a gap analysis report for PLICS and wider SLR engagement – 2016
- ① Design of tender document for a replacement patient level costing system (PLICS) - 2015

**North Central London Commissioning Unit**

- ① Undertaking a financial review of mental health services in North Central London by service line - 2015

**Leicester City CCG**

- ① Design and analysis of a financial model that demonstrates the future cost profile of an aging population, and calculates potential savings resulting from an integrated and innovative commissioning approach – 2014.

**Hillingdon CCG**

- ① Economic and financial analysis of Cardiac Rehabilitation services, including modelling the impact on wider NHS activity as well as comparing to other localities – 2014.

**Isle of Man Department of Health**

- ① Successfully completed a Scoping Review of implementing a new Patient Level Information Costing System (PLICS) for all services including Acute, Community and Mental Health Services across the island – 2013.

**States of Guernsey Health & Social Services Department**

- ① Providing financial advise and support to the department including the development of patient level costing – 2013.

**Hull & East Yorkshire Hospitals NHS Trust**

- ① Developed and completed a Business Case for the redevelopment of its Combined Heat & Power Unit - 2012.

**Mount Carmel Private Hospital – Dublin in the Republic of Ireland**

- ① Design and implementation of a Patient Level Profitability and Costing System - 2012.
- ① Costing the laboratory services – 2012

**Boehringer Ingelheim Ltd – United Kingdom**

- ① Detailed study of the cost and revenue of Warfarin blood monitoring in the NHS - 2012.
- ① Identified and negotiated the involvement of a partner NHS Trust.
- ① Designed a method of analysing the cost and revenue at patient level.



### Oxford University Hospitals NHS Trust – Oxford

- ① Project management and expert advice regarding the implementation patient level costing and service line reporting (PLICS and SLR) – 2011 to 2012.
- ① Tendering and eventual migration to Bellis Jones Hill's Prodacapo and ADAPPT PLICS systems following the merger of the Oxford Radcliffe Hospitals Trust and the Nuffield Orthopaedic Centre Trust - 2012.
- ① Integration of Reference Costs into the PLICS model, thus providing patient level Reference Costs – 2011 to 2012.
- ① Build improved links with clinicians and managers in Divisions as part of the project management of the wider process.

### Nottingham University Hospitals NHS Trust – Nottingham

- ① Assurance Report concerning the accuracy of the costing model for empath (East Midlands Pathology) and the way it interacts with the internal market of the Trust – 2013.
- ① Redesign of Trust's costing systems and training, advice and support to new Cost Accountant – 2008.
- ① Creation of purpose built PLICS system for 2 years which feeds off CACI's Synergy costing system, and preparation for migration onto Healthcost's PLICS system – 2008 to 2010.
- ① Development of Service Line Reporting – 2009 to 2010.
- ① Creation of the UK's first PLICS linked financial model to calculate the financial consequences of becoming a Major Trauma Centre at patient level. Advice to the Department of Health as part of this project – 2011.
- ① Redesign of Internal Trading systems for Radiology and Pathology, and replacement with a Patient Level Trading System – 2010 to 2011.
- ① Analysis and advice regarding financial impact of NHS Independent Treatment Centre adjoining the Trust – 2007.

### Smart Use Intelligent Solutions Ltd – Southampton

- ① Providing advice regarding company's software products in terms of integrating Procurement, Stock Management and Patient Level Costing systems - 2011.

### NHS Sheffield

- ① Analysis and advice regarding change of use of two dementia care homes which involved the production of a large Business Case for the provider unit - 2008.
- ① Developing and completing the financials on the above Business Case showing the resultant preferred option.

### University Hospitals Leicester NHS Trust

- ① Re-costing of Pathology services and creation of joint prices, following Department amalgamation with Nottingham University Hospitals. – 2011.



### Worcestershire Mental Health Partnership NHS Trust

- ① Redesign of Costing Systems, Synergy Implementation – 2008 to 2009.
- ① Introduction of Service Line Reporting in Mental Health.
- ① Undertook a rebasing exercise of main SLA income.
- ① Trained a new costing accountant.
- ① Provided advice for the development of a Mental Health PLICS system & developed linkages to new PbR currencies.

### Humber Mental Health Teaching NHS Trust – Hull in East Yorkshire

- ① Provided advice with the planning and implementation of a Foundation Trust application – 2007 to 2008.
- ① Preparation of £10m+ tender document including due diligence – 2008.
- ① Business Case Support for taking over another mental health service – 2008.
- ① Review of Financial Management (including Cost Improvement Plans, Board Reporting, Budget Setting and Structure) – 2008.

### Coventry and Warwickshire Partnership NHS Trust

- ① Supported a review of the Trusts costs and efficiency as part of a financial health check – 2008 to 2009.
- ① Undertook a “Fit for the Future” Review of the Trusts Finance Department - 2009.
- ① Undertook a Gap Analysis and Action Plan for the Auditors Local Evaluation (ALE) – 2009.

### Farming and Wildlife Advisory Group

- ① Produced a three-year Strategic Direction Report – 2009.

### Weston Area Healthcare NHS Trust – Weston Super Mare Avon

- ① Undertook a review of the Financial Management functions including PbR & Reference Costing – 2007.

### South Staffordshire & Shropshire Healthcare NHS Trust – Stafford

- ① Redesigned the Trusts costing systems and trained a new costing accountant in its use – 2007.

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## Career Summary

### 2006 – to date a variety of consultancy assignments.

- ① Completed a wide variety of assignments related to healthcare finance, both as an associate of In-Form Solutions and independently.



**2004 – 2006 Calderdale & Huddersfield Foundation NHS Trust – Assistant Director of Finance**

- ① Trust lead for costing, efficiency & VFM.
- ① Divisional lead for Surgery Division (c£90m).
- ① Successfully led a Trustwide efficiency & profitability review.
- ① Business Case preparation.

**1997 – 2004 Sheffield Teaching Hospitals NHS Foundation Trust – Divisional Accountant**

- ① Divisional lead for Diagnostics (£70m).
- ① Designed linkages between Clinical Information Systems & Finance.
- ① Improved a clinical internal trading model
- ① Also Cost Accountant responsibility.
- ① Built extensive experience of B Plan (now CACI) software systems.
- ① Supported a Trust merger to Sheffield Teaching Hospitals.
- ① Managed 15 staff.

**1989 – 1997 Burnley Healthcare NHS Trust – Various roles from a trainee**

- ① Trainee Accountant.
- ① Progression into management roles.
- ① Supervised the Commissioning Team at the introduction of GP Fundholding.

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**Special Interests & Reference**

- ① Children's Hospital Governor
  - ① Healthcare Financial Managers Association member
  - ① Skiing, Football, Golf and Badminton
  - ① Father
  - ① Adoption UK member
  - ① Reference will be from the above assignment list, relevant to the role in question
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