

Brief for the appointment of

Chief executive

Healthcare Financial Management Association
(HFMA)



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Introduction

from the president, Catherine Phillips

As president, I am pleased to invite applications for the role of chief executive of the Healthcare Financial Management Association (HFMA).

The HFMA occupies a well-established position within the UK health eco-system. For more than 75 years, it has supported finance professionals across the NHS and the wider healthcare landscape, offering a platform for professional development, collaboration and technical expertise. We are proud of our place in supporting finance professionals in healthcare and of the collaborative nature of our networks. We are an association built on strong foundations, with a respected reputation, an engaged membership and an experienced and positive team.

This appointment comes at an important moment in the HFMA's development. Following a long period of stable leadership, there is now an opportunity to take stock and to bring greater clarity to the association's future direction.

The context in which the HFMA operates is changing. Financial and structural pressures across the NHS are well publicised and significant, amongst those are the implications of the Governments 10 year plan for healthcare across England which will "reinvent the NHS through 3 radical shifts: hospital to community; analogue to digital; sickness to prevention." These challenges mean that expectations of associations such as the HFMA which support professionals are rapidly evolving, and the importance of strong financial leadership in healthcare continues to increase. The HFMA has

demonstrated how well placed it is to respond, but doing in an ever-changing, dynamic future will require a clear sense of priorities and a defined strategic focus.

The HFMA also operates across several dimensions, as a charity, a membership body and a commercially active association. Each brings different expectations, and the next chief executive will need to balance these with sound judgement.

The Board's ambition is to build on the HFMA's existing strengths: sharpening its direction, ensuring it continues to meet the needs of its members, and strengthening its position within the wider healthcare system.

This role offers both responsibility and scope. The successful candidate will inherit a strong platform, alongside the opportunity to work with the Board and executive team to shape the next phase of the association's development.

We are looking for a leader who combines clear purpose with sound judgement, and who approaches the role in a thoughtful, values-led way. Above all, we are seeking someone motivated by the opportunity to contribute to the healthcare system through the leadership of the HFMA.

I look forward to welcoming a chief executive who will take the association forward into its next chapter.

**Catherine Phillips,
HFMA president**

Who we are

The HFMA is the professional body for finance staff working across the UK healthcare system.

For over 75 years, the association has provided independent support and guidance to its members and across NHS organisations in the UK. It is a charitable organisation focused on promoting high standards of financial management and governance across the health economy, working through its national and regional networks to support professionals at all stages of their careers.

The HFMA plays a central role in the NHS finance community through three core areas of activity:

- supporting the profession, by providing access to networks, technical resources and professional guidance that enable members to perform effectively in complex and demanding environments
- influencing and informing, through analysis of national policy, contributions to consultations and engagement with stakeholders to support the effective development of healthcare finance systems
- developing capability, as the UK's most impactful provider of healthcare finance education and training, offering professional qualifications, continuing professional development and a broad programme of events and learning.

Membership provides access to a wide professional network, technical insight and ongoing development opportunities including how to ensure the opportunities presented by AI to the healthcare financial managers are fully capitalised upon, supporting individuals from early career through to senior leadership roles across the NHS and wider healthcare system.

The HFMA's work is grounded in a clear purpose: To improve the quality of health and care through the effective use of financial resources.



Our structure and operating context

The HFMA operates across three distinct but interrelated dimensions:

- a **charity**, with a responsibility to support the public good through the development of the healthcare finance profession
- a **membership association**, serving a large and engaged community of professionals
- a **commercially focused organisation**, generating income through events, partnerships and services that serves to fund our member activities and charitable contributions.

Balancing these roles is central to the association's success and is a key part of the chief executive's responsibility.



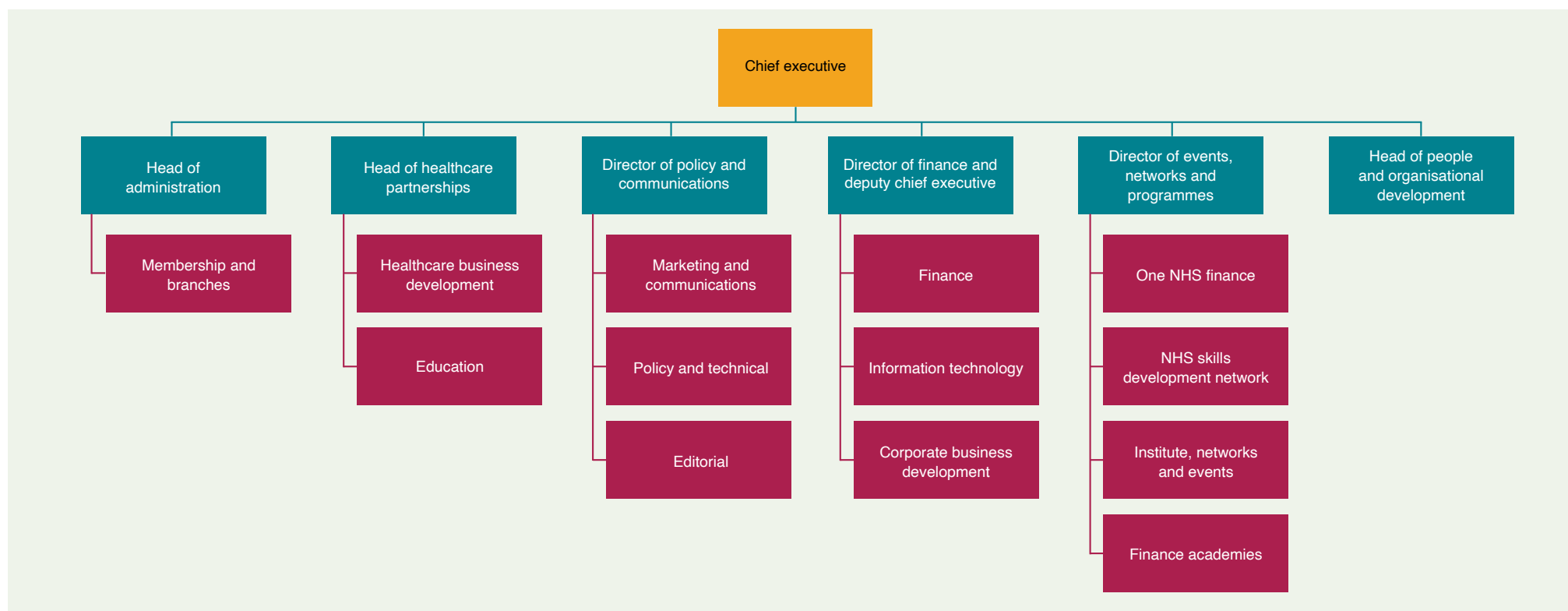
The team

The HFMA is supported by an experienced and committed team across policy, communications, events, membership and operations. We have 80 employees based across the UK but headquartered in Bristol.

The association benefits from:

- strong technical capability
- high levels of commitment to the sector
- a culture that is evolving towards greater collaboration and empowerment
- a collaborative relationship with government and policy makers across the UK and its devolved nations.

There is a clear opportunity for the next chief executive to build on recent progress and further develop the team's capacity and cohesion.



Our Board

The HFMA is governed by a Board of Trustees drawn primarily from within the healthcare finance community.

The Board brings:

- strong sector expertise
- commitment to the association’s purpose
- a willingness to support the next phase of HFMA’s development.

The chief executive will play a key role in working with the Board to refine and deliver the association’s strategy, while maintaining clear and effective governance.



Catherine Phillips
HFMA president 2025/26



Simon Crowther,
HFMA vice president



Dawn Scrafield
Vice president



Lee Outhwaite
Immediate past president



Claire Wilson
Past president



Lee Bond
Trustee & past president



Professor
Sanjay Agrawal
Trustee



Nicci Briggs
Trustee



David Chandler
Trustee



Kavita Gnanaolivu
Trustee



Nicky Lloyd
Trustee



Craig Marriott
Trustee



Eimear McCauley
Trustee



Peter Ridley
Trustee



Amy Whitaker
Trustee



Terry Whittle
Trustee

The role

Title:	Chief executive
Reports to:	Board of Trustees
Salary:	Competitive, commensurate with experience
Contract type:	Permanent
Location:	Bristol/Hybrid (no less than two days a week in Bristol)

Job Purpose

The chief executive is responsible for the overall leadership, performance and strategic direction of the HFMA.

The role requires an individual who can:

- provide clear compassionate leadership to the association and its team
- define and deliver a coherent strategy
- ensure financial sustainability
- represent the HFMA credibly within the healthcare system.

This is not a “business-as-usual” appointment. The Board is seeking a leader who can build on strong foundations while bringing clarity, focus and strategic direction to the association’s next phase.

Key Responsibilities

Strategic Leadership

- Define a clear and prioritised strategy for the HFMA, with explicit trade-offs across its activity areas
- Articulate what success looks like for the association over the next three to five years
- Ensure alignment between the association’s purpose, resources and delivery
- Strengthen the HFMA’s collaboration with equivalent organisations in the United States, Australia and, where appropriate, globally, ensuring international learning and insight can inform the wider UK health community

Organisational Leadership and Culture

- Embed a consistent, values-driven and empowering compassionate leadership approach
- Continue the development of a collaborative, accountable and professional culture
- Promote positive behaviours at all levels where required with clarity and fairness
- Develop and support a high-performing senior leadership team

Financial and Commercial Sustainability

- Strengthen the HFMA’s financial position and long-term sustainability.
- Evaluate and optimise revenue streams, including:
 - events and commercial partnerships
 - membership model
 - education and development activity
- Ensure that commercial decisions are aligned with strategic purpose

Membership Value and Engagement

- Maintain and enhance the value proposition for the HFMA members
- Ensure that the association continues to meet the needs of both current and future professionals
- Work with the team to consider the effectiveness and future role of different membership models



External Representation and Stakeholder Engagement

- Strengthen relationships with key stakeholders, including NHS England, Department for Health and Social Care (DHSC) and equivalent bodies across the UK
- Represent the HFMA with credibility and authority in external settings
- Ensure that the association operates as a trusted and constructive partner within the system

Policy and Sector Influence

- Provide leadership in shaping the HFMA's external voice and influence
- Balance constructive collaboration with the ability to reflect member perspectives
- Ensure that the HFMA contributes meaningfully to sector thinking and development

Governance and Board Engagement

- Work closely with the Board to ensure strong governance and clarity of decision-making
- Provide clear advice, reporting and insight to support effective oversight
- Maintain appropriate boundaries between executive and non-executive roles



Person specification

Experience

Essential

- significant experience operating at senior executive level, with accountability for organisational performance and direction
- demonstrated track record of developing and delivering strategy in a complex environment
- experience of leading organisational change, including cultural and operational transformation
- experience of working closely with a Board or equivalent governance body, including advising and influencing senior stakeholders and demonstrating the delivery of a strategic vision that is in line with a Board's ambitions
- proven ability to lead and develop high-performing executive or senior leadership teams.

Desirable

- experience operating across multiple organisational dimensions, such as:
 - membership organisations
 - charities or not-for-profit environments
 - commercial or revenue-generating activity
- experience engaging with public sector systems, particularly within healthcare or similarly complex, regulated environments
- exposure to policy, advocacy or influencing activity at a national or system level
- experience of balancing financial sustainability with member or stakeholder value delivery.

Skills and Capabilities

Essential

- strong strategic thinking and vision with the ability to define priorities and make clear, evidence-based decisions
- ability to balance competing organisational objectives, including purpose, financial sustainability and stakeholder expectations
- sound commercial judgement and a demonstrable ability to interpret financial performance and inform strategic direction
- highly effective stakeholder engagement skills, with the ability to build credibility at senior levels
- ability to operate with confidence in politically and operationally complex environments.

Desirable

- experience of developing or refining organisational value propositions, particularly in membership or service-led organisations
- experience of diversifying or strengthening revenue models
- ability to shape and articulate an external voice or thought leadership position for an organisation.

Leadership Style and Personal Attributes

Essential

- values-driven approach, underpinned by integrity and consistency
- collaborative and inclusive leadership style, with the ability to build trust quickly

- high level of emotional intelligence, with sound judgement in complex or sensitive situations
- ability to lead with clarity while maintaining a supportive and empowering environment
- willingness to take difficult decisions where required
- a visible and authentic leadership presence, capable of representing the organisation effectively.

Desirable

- experience of leading organisations or teams through periods of transition or reset
- personal resilience and adaptability in the face of ambiguity or change.

Qualifications and Professional Background

Essential

- evidence of continued professional development appropriate to a senior leadership role
- relevant professional qualification (e.g. finance, leadership, management or governance-related), or equivalent experiential background.

Desirable

- degree-level education or equivalent professional experience
- engagement with any relevant professional bodies or sector networks.

Why this role

This is a significant leadership opportunity at a pivotal moment for the HFMA.

The association has

- a strong reputation
- a committed team
- a valuable position within the healthcare system
- an inclusive, collaborative and compassionate working culture.

The successful candidate will have the opportunity to:

- shape the future direction of a nationally important Membership Association
- deliver meaningful impact for the healthcare finance profession
- lead the HFMA into its next phase with clarity and purpose.



How to apply

The preferred method of application is online at www.berwickpartners.co.uk/96035

Closing date for applications:
23:59 on Sunday 19th July 2026.

If you are unable to apply online, please email your application to response.manager@berwickpartners.co.uk

All applications will receive an automated response.

All candidates are also requested to complete an online Equal Opportunities Monitoring Form which will be found at the end of the application process.

For detailed information on how we process your personal data, please review our privacy policy on our website <https://www.berwickpartners.co.uk/privacy-policy/>

In line with GDPR, we ask that you do NOT send us any information that can identify children or any of your Sensitive Personal Data (racial or ethnic origin, political opinions, religious or philosophical beliefs, trade union membership, data concerning health or sex life and sexual orientation, genetic and/or biometric data) in your CV and application documentation. Following this notice, any inclusion of your Sensitive Personal Data in your CV/ application documentation will be understood by us as your express consent to process this information going forward. Please also remember to not mention anyone's information or details (e.g. referees) who have not previously agreed to their inclusion.

If you have any queries or would like more information relating to this document, please contact:

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