



## Personal Profile, Qualifications & Contact Points

### Key Experience

- ① 35 years working in healthcare finance (fully qualified for 30 years, consultancy for last 17 years) across financial management including reporting, commissioning, PLICS, business cases, best value, productivity and CIPs.
- ① Particular passion to add grip through better granular intelligence by combining financials with clinical data and outcomes, using these alongside the more traditional reporting processes.
- ① Many years of efficiency and productivity identification and analysis, including Get It Right First Time, Model Health System, PLICS Deep Dives, Elective Recovery etc.
- ① Commissioning roles include two highly successful years recently advising a health system (ICB and 5 trusts) how to optimise income from the Elective Recovery Fund (ERF) and how to structure their elective recovery to benefit both the waiting lists and financial position.
- ① A leading innovator in Person Level Costing (PLICS), Benchmarking and Service Line Reporting (SLR), including:
  - Designing PLICS models and dashboards for entire health and social care systems.
  - Advising clients how to use such intelligence to add grip and improve performance.
  - Mentoring, training, advice and support to costing staff, clinicians and wider stakeholders
  - Extensive knowledge of NHS costing and commissioning requirements, supporting software, the underlying clinical services and the drivers of their costs.
- ① Management of Acute Clinical Services (part of the senior management team for a surgical division in one very large trust and a diagnostics / therapeutics division in another).
- ① Former Governor of Sheffield Children's Hospital NHS Foundation Trust (voluntary role)

### Qualifications & Professional Bodies

- ① FCCA (Fellow of the Chartered Association of Certified Accountants) and CPFA (CIPFA)

**Location:** South Yorkshire, England

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### Professional Profile

A very experienced, insightful, technically skilled and affable consultant who has dedicated his career to improving best practice in healthcare finance and maximising taxpayer value for money.

Steve specialises in the entire financial management range but particularly focuses on the grip between financial performance and the granular non-financial drivers of this. Finance should be close to clinical services so to best influence performance and Steve understands clinical services in detail in acute, non-acute and commissioner settings. As such he has always been able to build strong relationships with clinical colleagues. Many roles advise clients how to build such links.

Steve's client list is long with many multi-year repeat clients. These are both national and international, and all healthcare sectors, with full client satisfaction across a 17 year consultancy career (following 20 years working in hospitals from trainee up to sub director level).



## Other Interests & Reference

- ① Fully and professionally equipped home office dedicated to business with fibre broadband
- ① NHS Net account (via In-Form Solutions)
- ① Healthcare Financial Managers Association member
- ① Skiing, Golf, Tennis and Badminton
- ① Football Season Ticket
- ① Father and Adoption UK member
- ① Casual studier of psychology and personal health especially microbiome health
- ① Reference if required will be from the assignment list, relevant to the role in question

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## Assignments Undertaken (most recent first – pre consultancy career follows consultancy project list)

### Government of Jersey Health and Community Services (2016 to 2024)

- ① Long-term advice and leadership to design and implement a system-wide patient level costing system with granular reporting and intelligence, covering most health and social care.
- ① Outcomes:
  - Prodacapo / Qlikview PLICS system successfully commissioned and implemented
  - 7 years of completed PLICS models with dashboard reporting
  - Benchmarked against UK NHS at a granular level, with variance analysis
  - Produced lengthy reports analysing output and identifying efficiency and productivity potential (e.g. clinical variation, underutilised capacity or private cost recovery)
  - Produced Long Term Costing Strategy including a Clinical Engagement Plan

### Lancashire and South Cumbria ICB & all 5 Trusts within the ICB (2021 to 2023)

- ① Elective recovery lead for financial assurance and advice – close working with directors and assistant directors across the ICB in both commissioners and providers, advising and analysing how to optimise income from the Elective Recovery Fund (ERF) and how to structure their elective recovery to benefit both the waiting lists and financial position
- ① Outcomes:
  - Directly attributable financial benefits of £20m+ arising from this assurance work
  - Model that consolidated system-wide granular performance and added monthly reporting
  - Trusts and ICB became more aware of which specialties were ahead or behind recovery trajectories and could instigate corrective action
  - Reconciliation with NHS England ERF figures with several successful appeals that led to increases in funding
  - Close working and advice given to the Midlands and Lancashire CSU Business Intelligence team and the NHS England Business Intelligence team regarding improvements to the reporting of elective recovery and the accuracy of underlying data (extensive work at patient level with SUS and backing datasets)



### Midlands Partnership NHS Foundation Trust (2018 to 2022)

- ① Independent expert advice as a member of the FT's PLICS Steering Group, advising how to improve costing processes and bring in non-financial elements and benchmarks
- ① Outcomes:
  - A report to create a process to enhance the FT's financial reporting with non-financial elements such as benchmarking and performance
  - Designed a Long-Term Costing Strategy for the FT and provided mentoring, advice and support
  - Advised the FT regarding mergers between organisations and how to create a consolidated and consistent costing model
  - A report that explored the FT's readiness for PLICS in settings including mental health, community, continuing health care and social care

### Government of Gibraltar Health Authority (2019 to 2020)

- ① For a small independent health system without the NHS's mandatory data collections a person-level costing model was designed that explored what was possible and gave granular insights into performance and variation at patient level.
- ① Outcomes:
  - A report for GHA that analysed the costs of the health system and recommended potential areas for efficiency and productivity improvements
  - Designed 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 (far more than 50% of this model was at patient level)
  - A readiness review for Service Line Reporting and Patient Costing that involved scrutiny of all available data

**Older Assignments follow without full detail of outcomes which is available on request**

### 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 outcome based 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 advice 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 of 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 Worked closely with clinicians and managers in Divisions to build better links with Finance 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 for which independent advice was given as part of tendering – 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 other consultancies as well as independently.

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

- ① Financial lead for Surgery Division (c£90m) and part of Surgical Senior Management Team so extensive involvement in financial performance including budgets, business cases and efficiencies / CIPs.
- ① Trust lead for costing, efficiency & VFM.
- ① Successfully led a Trustwide efficiency & profitability review.
- ① Business Case preparation.



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

- ① Financial lead for Diagnostics and Therapeutics Division (£70m) and part of Senior Management Team for the Division. Extensive involvement in financial performance.
- ① Designed linkages between Clinical Information Systems & Finance.
- ① Improved a clinical internal trading model.
- ① Trust lead for costing.
- ① Built extensive experience of B Plan (now CACI) software systems.
- ① Supported a Trust merger into 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.