

## **JOB DESCRIPTION**

### **JOB DETAILS**

<b>Job Title:</b>	Assistant Director – Delivery & Improvement, Finance Delivery Unit
<b>Band:</b>	8c
<b>Salary Scale:</b>	<b>£67064 - £77274</b>
<b>Hours of Work:</b>	Full Time – 37.5hrs
<b>Department:</b>	Finance Delivery Unit
<b>Base:</b>	Bocam Park, flexible arrangements can be considered, extensive travel may be required with some planned overnight stays.

### **BACKGROUND**

The Finance Delivery Unit (“the Unit”) is a unit established to provide professional support to Welsh Government to respond and deliver on the financial challenges facing NHS Wales. The Unit operates across Wales and in support of all NHS Wales organisations as required. This includes:

- Monitoring and managing financial risk in NHS Wales, responding at pace where organisations are demonstrating signs of financial concern.
- Support the robust development and delivery of in-year and medium term financial and resource plans.
- Driving forward the efficiency agenda for NHS Wales, working with NHS Wales organisations to ensure maximum return from efficiency opportunities.
- Promote and embed best practice financial management and use of resources.
- Developing a Centre of Excellence for Financial Information and Intelligence, reflecting costing, benchmarking, resource allocation, and utilisation, to assist in driving improvements on both technical and allocative efficiency across NHS Wales.
- Lead research and identifying best practice in financial management and rapid adoption of proven practice and evidence in a consistent and comprehensive way across Wales. This includes best practice approaches, methodology, and deployment.
- Support the development of Value Based Healthcare within NHS Wales as required.

The unit will deliver on this agenda through building effective relationships within and across NHS Wales, and Welsh Government, enabling delivery of these objectives.

### **JOB SUMMARY**

The Assistant Director is a key senior leadership role in supporting the Director of the unit to deliver on the agenda outlined above and will be a senior finance professional who is a key part of the Unit’s team. The role will have a lead responsibility for key aspects of the Unit’s portfolio, in addition to having a lead role as the main support and liaison with specific NHS organisations. The post holder will deputise for the Deputy Directors and the Director as required on lead areas of responsibility, contributing to the day-to-day management of the unit as a key member of the team to ensure that all objectives are delivered.

The post holder will provide senior leadership to an individual aspect of the Unit’s portfolio as outlined above, such as identifying evidenced based best practice financial management and supporting its dissemination or providing a lead role in identifying best practice financial delivery on an in-year basis and sharing learning across NHS Wales.

The post holder will seek to identify opportunities for improvement, learning, and evidence from other UK NHS organisations, and international benchmarks where appropriate, and take a lead role on behalf of the unit in liaison and networking with those stakeholders. This includes responsibility for the relationship with a large stakeholder organisation.

The post holder will provide a lead role on behalf of the Unit to support the Finance Academy as required in delivery of improvements in areas of commonality and mutual development across key financial management domains, such as improvements in Financial Governance.

The post holder will play a lead role in the development of financial frameworks and key metrics in their areas of responsibility and as determined as priority for Welsh Government, such as the development of improved frameworks associated with risk management, forecasting, and financial planning.

The post holder will play a lead role in the development of excellence in benefit realisation techniques and developing the Unit's capability and capacity in relation to investment and option appraisal to support Welsh Government priorities as required.

The post holder will support the wider team in the development of key financial intelligence and analysis through contributing to its development and testing its application in key areas of responsibility. This will include the development of the NHS Wales Value, Allocation, Utilisation, Learning Toolkit (VAULT).

The post holder will play a key role in supporting the delivery and challenge of specific individual NHS organisations, supporting wider members of the Unit team and the wider Welsh Government HSSG Finance Team, including the Unit Director and NHS Wales Director of Finance as required. This will include supporting all aspects of any intervention and support required.

The post holder will play a lead role in the development, implementation, and monitoring of key financial assessment tools, and metrics, that assess and measure organisational financial performance, within their area of responsibility. This includes identifying areas for improvement and action for supported organisations.

The post holder will play a key role in supporting the development and implementation of key products developed by the Unit and establishing optimal delivery models to ensure the delivery of best practice financial management. This will include leading on projects as required on a national basis.

The post holder will support the development and implementation of the Value Based Healthcare agenda as required through working with the wider Unit team and lead areas of responsibility.

**Key internal & external relationships include:**

- Welsh Government HSSG Finance Directorate
- NHS Wales organisations' (including hosted bodies) Directors of Finance
- NHS Wales organisations' senior finance teams
- NHS Wales Delivery Unit
- NHS Wales Finance Academy
- NHS Wales Planning & Performance Teams
- Other UK NHS organisations including NHS England, NHS Scotland
- Key external organisations including academic, commercial, benchmarking & performance partners
- Other sector high performing organisations as required
- Other professional leadership groups e.g. Medical Directors

## **DUTIES AND RESPONSIBILITIES**

### **Communications & Relationships**

- Using and understanding complex information, with multi-factorial strands of communication to a wide range of stakeholders.
- Provide leadership and direction across situations where highly complex ideas or concepts need to be conveyed and implemented in easily understood language.
- Develop close working relationships with a number of stakeholders to deliver the Unit's business objectives.
- Providing and receiving highly complex, highly sensitive or highly contentious information, where there are significant barriers to acceptance, overcome these using the highest level of

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interpersonal and communication skills, such as would be required when communicating in a hostile, antagonistic or highly emotive atmosphere.

- Providing “best practice” advice to NHS Wales organisations on all aspects of financial management. Interpret emerging guidance, standards, policy, and evidence bases to inform anticipated action and implications.
- Communicate directly with Boards, managers, clinicians and staff, patients and the public, demonstrating a high level of presentation skills. Write convincing, well researched and articulate papers for Board level consumption.
- To work with the Director and Deputy Director to ensure the delivery of the Unit’s objectives across all elements of the Unit’s portfolio.

- **Analytical & Judgemental Skills**

- To exercise judgement involving highly complex facts and figures and situations which require the analysis, interpretation, and comparison of a range of options.
- Be able to analyse and assess conflicting information *where expert opinion may differ*, or information may not be viable relying on judgement and critical thinking to deliver an appropriate outcome.
- Exercise specialist knowledge across a range of managerial work procedures and practices underpinned by theoretical knowledge and practical experience.
- Interpret data for various purposes to feed into policy, service, delivery, and strategy.
- Work closely with NHS Wales organisations to provide comparative analysis to support pathway development across acute, primary and community care settings.
- Analyse all metrics applicable to optimal performance and support drive for improvement in financial performance and delivery.

- **Planning & Organisational Skills**

- To plan and prioritise own work, to ensure effective support to all areas and delivery of key objectives.
- To regularly monitor and review a variety of delivery plans, intervening when required to ensure delivery stays on track, and in response to national policy guidance and strategic requirements.
- Responsible for the effectiveness of financial monitoring as a means for ongoing review of organisations sustainable financial health and delivery against all improvement programmes.
- Lead in providing professional financial assessments of the overall holistic view of financial performance and sustainability by organisation.
- Play a lead role in establishing and developing relationships and shared learning across a range of stakeholder organisations including other NHS organisations across the UK, translating relevant learning into tangible improvement plans for NHS Wales as appropriate.
- Work closely with all members of the Unit to ensure that relevant financial intelligence and evidence is used to support the development of future financial plans.
- Ensure follow-up, quantification, and translation to delivery plans of key elements of effective resource utilisation plans.

- **Managerial & Leadership**

- To direct, lead and motivate the team to ensure a high standard of professionalism, efficiency, and effectiveness in the delivery of the Unit’s business objectives, ensuring that activity is fully aligned to the strategic policy and delivery requirements of Welsh Government. This will include coaching and mentoring, resource planning, standard setting, performance management, team, and individual development.
- Ensure that the Unit’s aims and objectives are clearly communicated to the staff within the team.
- Play a lead role in developing assessment tools, metrics, and frameworks to support assessment of financial performance for areas of responsibility.
- Facilitate decision making, providing professional advice on benefits and risks, ensuring the Unit function is proactive and influential in its contribution to Welsh Government’s strategic policy, frameworks, and delivery plans.
- Support the development and empowerment of all members of the team to perform to high standards and innovate.

- Drive improvements in NHS Wales financial performance through establishing, disseminating, and supporting best practice improvements.
- Provide a leadership role in developing relationships and networks across a range of stakeholders and NHS organisations to support development and capture of evidence based best practice to support NHS Wales improvement and delivery.
- **Policy & Service Development Implementation**
  - Responsible for a range of policy and framework development and implementation to support NHS Wales financial delivery.
  - Implementation of a range of policy and delivery initiatives across multiple organisations to deliver upon the Welsh Government agenda for continuous improvement.
  - Work with partner organisations and stakeholders as appropriate in collaborative schemes for delivery of joint strategy and service developments.
  - Develop models to modernise structures that support new ways of working and future service development.
  - Work with the Delivery Unit, Welsh Government, and others to ensure that the information required to produce financial analysis is developed and available on a timely basis.
  - Work with the Delivery Unit and other stakeholders to ensure all plans and service changes are fully analysed, performance assessed, and benchmarked.
  - Work with Clinical and Public Health colleagues, and others, in developing health needs related models to assist in identifying investment/disinvestment requirements at a national level.
  - Responsible for ensuring best practice in other organisations is researched and implemented locally.
- **Resource Management:**
  - To support the day-to-day budgetary management of the Unit.
  - To support the management of one large financial or physical service(s), including budget setting and monitoring of budgets and responsibility for physical assets.
  - Ensure robust systems of governance (clinical, financial, staff, audit, and information) and risk management are in place.
  - To line manage and be responsible for ensuring an effective system of performance management, including appraisal and personal development, for all direct reports and their staff, including active succession and workforce planning.
  - To ensure all direct reports are aware of their managerial responsibilities for human resource issues within their areas of responsibility.
  - To work with the Human Resources team in ensuring that robust HR policies and processes are in place in all areas of operational responsibility.
  - Ensure that staff within the Unit are working to competencies which are regularly assessed and appropriate in line with Agenda for Change and the Knowledge and Skills Framework.
- **Research & Development**
  - The post holder is responsible for qualitative and quantitative audits to evaluate the impact of the Unit's developments and relevant research to inform future service improvements.
  - Play a lead role in research into other Health systems both within and outside of the UK
  - Ensure an evidence-based approach to policy development and service redesign and consider the outcomes of relevant audit and/or evaluation work on all aspects of the role.
  - Research and ensure that innovation and good practice is disseminated across NHS Wales to maximise best practice spread and sustainability, avoiding duplication.
- **Freedom to Act**
  - Responsible for the day-to-day management and strategic development of all elements within the post-holders portfolio, balancing the need for proactive service development and strategic leadership against the reactive demand of in-year financial delivery and the needs of multiple stakeholders.
  - The post-holder will be expected to work independently guided by broad health and social care strategies and organisational policies and specific local and national guidelines, advising on how

these should be interpreted and implemented. This includes working collaboratively with stakeholders on agreeing national guidance and Programmes where appropriate.

- The post holder will need to assimilate and summarise complex documents, compare facts and analyse situational data from a range of sources, develop options and assess risks and opportunities to NHS Wales and facilitate consensus building and decision making.
- The role is a senior post within the NHS Wales Finance Delivery Unit. It will need to work very closely with the Unit Director, and other senior members of the team, including the Welsh Government HSSG Director of Finance, and Welsh Government HSSG Finance Directorate, whilst maintaining a degree of independence required to provide the scrutiny and challenge required to drive the NHS Wales financial delivery agenda on a sustainable basis.
- Close working relationships will need to be built with other organisations, Board members, senior clinicians and managers throughout organisations. The post holder will need to work with a high degree of autonomy and will be expected to frequently deputise for the Delivery Unit's Deputy Director, and the Unit Director.

- **Knowledge, Training & Experience Requirements:**

- Extensive experience, working at a senior level in a large complex organisation.
- Minimum of five years' experience as a senior finance manager within the NHS.
- Record of effective contribution to the development of business strategy.
- Experience of planning and implementing long-term development programmes.
- Proven experience of developing and delivering financial management services successfully for a large organisation.
- Proven track record of successfully introducing service improvement or successful management of significant organisational change in a complex environment.
- Experience of strategic thinking at a senior level.
- Significant experience of working with staff, their representatives, and professional organisations.
- Demonstrable success in building, leading, motivating, managing, and developing teams.
- Participation in significant change management projects.
- Ability to influence at all levels and a highly strategic thinker.

- **Physical, Mental & Emotional Requirements and skills:**

- There is a regular requirement to travel between NHS and other sites often with limited time between meetings.
- Frequent VDU use is required for this post for periods of up to 3 to 4 hours at a time to produce complex reports and analysis to support decision making.
- Intense concentration will be required on a wide variety of complex issues throughout the day. The post holder will frequently have to adapt to changing priorities and re-focus the work of self and others on new priority areas that may require urgent action.
- The post holder will participate in and facilitate meetings which require a high level of concentration on a wide range of topics, with a variety of audiences and mixtures of attendees.
- The role will require daily negotiation with senior NHS professionals, directors, and managers in a financially constrained health economy, on issues that have a significant impact, challenging practice and established management processes.
- The post holder will also be expected to deal positively and promptly with staff concerns and personal problems, challenging staff on any inappropriate behaviours or poor performance and investigate and deal with complaints as required.
- The post holder will frequently undertake an assessment based on information from a range of business intelligence, to advise senior Welsh Government stakeholders, ensuring that any risks are clear and appropriately managed.
- Dealing with very urgent issues as they arise and preparing reports expeditiously for a range of audiences, including the Health Board and Welsh Government.

## **VALUES & BEHAVIOURS**

- Conveys ideas and opinions clearly and confidently and adapts language and style to relate effectively to other. Is empathetic, takes time to listen and talk to people to understand their needs and gives appropriate consideration to the concerns expressed by others.

- Displays a fair and equal approach and treats others with respect. Works collaboratively with partners to initiate and leverage opportunities across NHS Wales. Proactively shares knowledge and ideas with others whilst recognising and rewarding their contribution. Is aware of the impact they have on others.
- Builds effective relationships with a wide range of people both internal and external to the Unit and Welsh Government, relating well to people at all levels. Creates links with local networks looking for further opportunities to develop partnerships.
- Prioritises and sets clearly defined objectives to produce positive results for the local community. Takes account of a wide range of issues, internal and external to effectively identify and manage resources needed to meet targets.
- Makes evidence-based decisions by managing knowledge through gathering and analysing information and considering the wider picture. Empowers others by giving them the authority, information, resources, and guidance to make decisions and implement them. Makes decisions in a timely manner regardless of pressure or uncertainty.
- Holds self and others accountable for delivering a high-quality service and is aware of own and others' strengths and limitations. Displays a willingness to learn and takes responsibility for own development and for standing up for what they believe in. Is confident in their ability to overcome obstacles and is willing to learn from their mistakes.
- Continually seeks opportunities for service improvement by fostering a climate of curiosity, creativity, and innovation. Promotes organisational effectiveness by anticipating and dealing with problems and is willing to learn from others.
- Prioritises and sets clearly defined objectives to produce positive results. Takes account of a wide range of issues, internal and external to effectively identify and manage resources needed to meet targets.
- Is positive about the need for change and demonstrates a flexibility and willingness to embrace change. Deals effectively with ambiguity and adapts quickly to changing circumstances. Remains open to new ways of working, making positive use of the opportunities presented.

## **COMPETENCE**

You are responsible for limiting your actions to those which you feel competent to undertake. If you have any doubts about your competence during the course of your duties, you should immediately speak to your line manager.

## **REGISTERED PROFESSIONAL**

All employees of the Finance Delivery Unit, hosted by Public Health Wales, who are required to be registered with a professional body, to enable them to practice within their profession, are required to comply with their code of conduct and requirements of their professional registration.

## **SUPERVISION**

Where the appropriate professional organisation details a requirement in relation to supervision, it is the responsibility of the post holder to ensure compliance with this requirement. If you are in any doubt about the existence of such a requirement speak to your manager.

## **RECORDS MANAGEMENT**

As an employee of Public Health Wales, you are legally responsible for all records that you gather, create, or use as part of your work within the Organisation (including patient health, financial, personal and administrative), whether paper based or on computer. All such records are considered public records, and you have a legal duty of confidence to service users (even after an employee has left the Public Health Wales). You should consult your manager if you have any doubt as to the correct management of records with which you work.

## **HEALTH AND SAFETY REQUIREMENTS**

All employees of the Unit have a statutory duty of care for their own personal safety and that of others who may be affected by their acts or omissions. Employees are required to co-operate with management to enable the Unit, as hosted by Public Health Wales, to meet its own legal duties.

## **FLEXIBILITY STATEMENT**

The content of this Job Description represents an outline of the post only and is therefore not a precise catalogue of duties and responsibilities. It is provided only as a guide to assist the employee in the

performance of their job. The Unit will be a fast moving and responsive organisation reacting to the requirements of NHS Wales and therefore changes in employees' duties may be necessary from time to time. The job description is not intended to be an inflexible or finite list of tasks and is subject to review and amendment in the light of changing circumstances, following discussion with the post holder.

#### **CONFIDENTIALITY**

All employees of the Unit as employees of Public Health Wales are required to maintain the confidentiality of members of the public and members of staff in accordance with Public Health Wales policies.

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**Date Prepared: 01/02/18 – Reviewed 23/7/2021**

**Prepared By: Hywel Jones**

**Date Reviewed: 01/02/18**

**Reviewed By: Caroline Hill**

**Agreed By:**

**Date:**

**Employee's Name and Signature:**

**Agreed By**

**Date:**

**Manager's Name and Signature:**

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## PERSON SPECIFICATION - GUIDANCE

The person specification should set out the qualifications, experience, skills, knowledge, personal attributes, interests and other requirements which a post holder requires to perform the job to a satisfactory level.

<b>Job Title:</b>	<b>Assistant Director – Delivery &amp; Improvement, Finance Delivery Unit</b>	<b>Post Number:</b>	
<b>Grade:</b>	<b>8c</b>	<b>Department:</b>	<b>Finance Delivery Unit</b>
<b>Base:</b>	<b>TBC</b>		

ATTRIBUTES	ESSENTIAL CRITERIA	DESIRABLE CRITERIA	DEMONSTRATED BY
<b>QUALIFICATIONS</b>	<ul style="list-style-type: none"> <li>CCAB / CIMA Qualified &amp; Member of Professional body.</li> <li>Educated to Postgraduate level or equivalent</li> <li>Evidence of Continuing Professional Development</li> </ul>	<ul style="list-style-type: none"> <li>Programme / Project Management qualification</li> <li>Evidence of personal research into a clinical, managerial, financial area</li> </ul>	Application form
<b>EXPERIENCE &amp; SPECIALIST KNOWLEDGE</b>	<ul style="list-style-type: none"> <li>Extensive experience, working at a senior level in a large complex organisation</li> <li>Significant experience as a senior finance manager within the NHS</li> <li>Record of effective contribution to the development of business strategy</li> <li>Experience of planning and implementing long-term development programmes.</li> <li>Proven experience of developing and delivering financial management services successfully for a large organisation.</li> <li>Proven track record of successfully introducing service improvement or successful management of significant organisational change in a complex environment</li> <li>Experience of strategic thinking at a senior level</li> <li>Significant experience of working with staff, their representatives and professional organisations</li> <li>Demonstrable success in building, leading, motivating, managing and developing teams</li> <li>Participation in significant change management projects</li> <li>Ability to influence at all levels and a highly strategic thinker</li> </ul>	<ul style="list-style-type: none"> <li>Demonstrates expertise in specific professional areas</li> <li>Experience of Turnaround &amp; Intervention approaches and delivery</li> <li>Good knowledge of NHS Wales finance regime, including a thorough understanding of organisations financial duties, responsibilities and governance requirements</li> <li>Good understanding of the concepts of Value Based Healthcare</li> </ul>	Application form / interview References
<b>SKILLS &amp; ABILITY</b>	<ul style="list-style-type: none"> <li>Ability to analyse and appropriately present often highly complex</li> </ul>	<ul style="list-style-type: none"> <li>Ability and confidence to constructively</li> </ul>	Application Form

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	<p>information</p> <ul style="list-style-type: none"> <li>• Proven ability to achieve targets and objectives within a demanding and pressured environment against challenging deadlines.</li> <li>• Sound judgement, decision making, and organisational skills</li> <li>• Able to interpret legislation and guidance as appropriate to the role.</li> <li>• Able to demonstrate a high level of interpersonal skills, displaying credibility, influence and political acumen</li> <li>• Able to interpret complex qualitative and quantitative information and provide advice to senior leaders</li> <li>• Ability to communicate excellently both verbally and in writing in a manner which is clear, fluent and persuasive</li> <li>• Self-motivated and committed to developing self and team members</li> <li>• Ability to work on own initiative and organise own workload and that of the team to operate effectively</li> <li>• Ability to work independently to a specified remit, ensuring agreed deadlines and deliverables are met</li> <li>• Highly tuned analytical skills, including ability to identify key issues from a range of complex financial data</li> <li>• Standard keyboard skills</li> </ul>	<p>challenge and support senior NHS staff and their teams</p> <ul style="list-style-type: none"> <li>• Ability and confidence to demonstrate leadership across NHS Wales on driving improvements in financial planning and financial management</li> </ul>	Interview References
<b>DISPOSITION</b>	<ul style="list-style-type: none"> <li>• Appropriate attitudes with a high level of professional ethics and integrity</li> <li>• Enthusiastic, Committed, Proactive, and Innovative</li> </ul>		Interview
<b>OTHER REQUIREMENTS</b>	<ul style="list-style-type: none"> <li>• The ability to travel locally and nationally in a timely manner</li> <li>• Emotionally Intelligent</li> <li>• Politically astute &amp; high level of intuition</li> <li>• Work collaboratively &amp; build relationships effectively</li> <li>• Resilience &amp; reliability under pressure</li> <li>• Appetite for challenges, with a high level of personal integrity</li> </ul>	<ul style="list-style-type: none"> <li>• Ability to communicate in Welsh</li> <li>• The ability to travel between sites in a timely manner</li> </ul>	Application & Interview

<b>Date Prepared:</b>	01/02/18 (23/7/21)	<b>Prepared By:</b>	Hywel Jones
<b>Date Reviewed:</b>	01/02/18	<b>Reviewed By:</b>	Caroline Hill
<b>Agreed by: Employee</b>		<b>Agreed By: Manager</b>	
<b>Date Agreed:</b>		<b>Date Agreed:</b>	