

# Director of Finance

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**Livewell Southwest**

Plymouth

Devon

UK

Candidate Pack

**Date:** June 2020

**Document:** Recruitment Pack V4 - Jane Yeates

*We support people to lead independent, healthy lives*

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## THE ROLE

**Job Title:** Director of Finance

**Reports to:** Chief Executive

**Location:** Plymouth, Devon, Southwest.

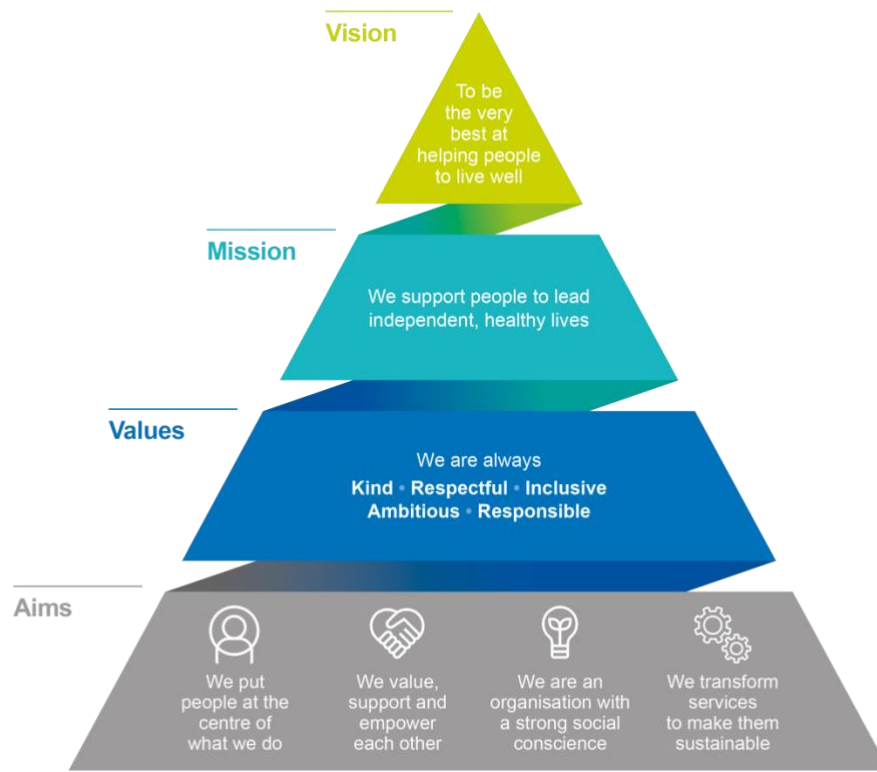
**Salary:** VSM

**Contract:** Permanent / Full time



## SUMMARY

Livewell is looking for a Director of Finance who is commercially astute, an inspiring leader with a proven ability to deliver our short, medium, and long term financial strategy. We are looking for an experienced and qualified professional with a recent track record of financial, economic, commercial, and business development expertise. This is a highly influential role, presenting the opportunity to sustain and innovate the future of integrated health and social care across the western locality, making a positive difference for people using our service, our staff, partners and community. Our successful Director of Finance will ideally come with health and social care, NHS or public sector experience and will complement our Board with senior management credibility, system knowledge and genuinely hold people at the heart of what they do to deliver a high quality, viable and sustainable service.

We are an independent, award-winning social enterprise providing health and social care services for people across Plymouth, South Hams, and West Devon, as well as some specialist services for people living in parts of Devon and Cornwall. A leader in integrated care, we continue to innovate our services into multidisciplinary teams shaped around our localities. This helps us to deliver the right care for people, in the right place and at the right time. We cover a diverse range of clinical care, community, physical and mental healthcare, adult social care, as well as professional specialist services. We are about people not patients where wellbeing is our priority.



**Aims**

 <p><b>We put people at the centre of what we do</b></p> <p>We <b>respect</b> the goals each person sets for their health and lifestyle, working with them and for them to help them to succeed.</p> <p>We are <b>ambitious</b> in our aspirations for their health and wellbeing, and we encourage them to be ambitious too.</p> <p>We will treat people with <b>kindness</b> and <b>include</b> them in their care, using their experiences to make our services continually better.</p>	 <p><b>We value, support and empower each other</b></p> <p>We <b>respect</b> the professionalism and dedication of our colleagues by sharing the <b>responsibility</b> to make decisions where and when it matters, trusting everyone to do the right thing.</p> <p>We treat each other with <b>kindness</b> and encourage the <b>ambition</b> to excel every day.</p> <p>We value learning from experience and use it to make our services and ourselves better.</p>	 <p><b>We are an organisation with a strong social conscience</b></p> <p>We seek out opportunities to deliver social, economic and environmental benefits in the communities we serve.</p> <p>We are <b>ambitious</b> in the way we design and deliver services, using innovation to enable us to go above and beyond.</p> <p>We partner with like-minded employers, suppliers and fellow social enterprises to support the economy and be a <b>responsible</b> force for good.</p>	 <p><b>We transform services to make them sustainable</b></p> <p>We work within communities and with community partners, investing <b>responsibly</b> to help people to look after themselves and live well.</p> <p>We make it easy to access extra support if and when it is needed.</p> <p>We recognise the changing needs of people and communities, by <b>including</b> them in shaping our services to be the best.</p>
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*We support people to lead independent, healthy lives*

## DIRECTOR OF FINANCE

### ROLE PURPOSE

To support people to stay well in the place and community in which they live, where they can enjoy the best quality of life.

- **FINANCE** – Responsible for all aspects of finance, commercial negotiation, contracts, agreements, performance management, dataset production, estimates and budgeting, capital expenditure, and negotiations.
- **STRATEGY** – Ensure our financial strategy delivers on our mission to support people to lead independent, healthy lives whilst staying true to our values of being kind, respectful, inclusive, ambitious and responsible in everything we do.
- **LEADERSHIP** – A values-based leader, credible and ambassadorial in approach in relationships with key partners and stakeholders, influencing and negotiating the best outcomes. An enabler of teams and individuals to deliver their best potential in innovative and transformational ways.
- **PERFORMANCE AND GOVERNANCE** – Ensure compliance with organisation's financial regulations and responsibilities ensuring statutory obligations are met. Effectively challenging performance across our organisation adding financial and commercial direction to deliver the highest standards of care, innovation and sustainability.
- **BUSINESS DEVELOPMENT** – To drive and implement our future digital strategy in a transformational way. Being lead director for business intelligence, information management and technology (IM&T).

### THE PERSON

Our Director of Finance will be an experienced executive with accounting, commercial, economic and financial credentials from a health and social care, NHS or public sector background.

They will require a strong commitment to the values of community and integrated care, championing that this is delivered in a sustainable way to the highest standard.

The successful candidate will bring a portfolio of boardroom skills in addition to audit and financial expertise including performance management, leadership, relationship building and change management.

They will have a proven track record of strategic planning, financial management, risk management, organisation performance management and service delivery in a regulated environment.

Experience of and a high level of commitment to building and developing successful partnerships, alliances and working relationships with a range of stakeholders.

They will have exemplary communication and interpersonal skills coupled with high emotional intelligence being politically astute.

Our Director of Finance will already carry a successful professional reputation gained in their field, be someone with exemplary credentials, displaying the utmost integrity and transparency.

The right person will be self-motivated, intellectually flexible, resilient with sound judgement.

Someone effective at balancing working remotely as well as amongst our teams, partners, and in the community we serve.

## ESSENTIAL

### Finance

- Minimum 10 years of financial management experience in a complex organisation.
- Minimum 5 years of this experience in a senior role.
- Experience of managing large complex budgets.
- Expert knowledge of financial accounting procedures, relevant legislation and financial policies.
- Preparation and presentation of complex board reports to a range of audiences.
- Preparation of end of year accounts for audit purposes.
- Preparation of comprehensive budgets and cash flow forecasts.
- Understanding of the statutory requirements for a Community Interest Company, e.g. Articles of association, Registration and Memorandum of Association.
- Experience in implementing or overseeing financial models or practice within a public organisation.

## Strategy

- Specialist financial/accountancy training/experience to a strategic level.
- Strategic management, project management and planning experience.
- Able to think strategically and act corporately to deliver the company's strategies and work programmes.
- Can ensure a strategy delivers on its vision and mission demonstrating core values.
- Experienced at leading or influencing strategic and transformational change.
- Can demonstrate and articulate strategic thinking and deliver it with clarity.
- Evidence of working collaboratively within a Board to deliver short, medium and long-term objectives.

## Performance & Governance

- Developing and reviewing effective financial systems, governance, communication systems and controls.
- Track record of delivery and meeting deadlines and targets.
- An able and articulate champion of value for money; robust in negotiations with budget holders and managers at all levels of the organisation.
- Review, challenge and deliver performance across an organisation adding value and direction to expect the highest standards of care and governance.
- Experience of delivering to the heart of an organisation whilst staying true to performance and sustainability.
- Track record of overseeing the improved delivery of performance objectives clearly and transparently.
- Articulate at reviewing, responding and advising on performance, focusing results on proactive improvement and innovation.
- Ability to assess, challenge and balance risk, having clear governance, auditory and regulatory requirements at the fore.

## Leadership

- Demonstrable experience and expertise in finance management, strategic and staff leadership.
- Successful track record of effectiveness at senior management level in a complex organisation.
- Experience in commissioning and managing services.
- Proven track record of operating at a senior level overseeing the financial position of a complex, multi-faceted organisation.
- In common with other members of the board act as a collaborative ambassador facilitating effective working partnerships across an organisation, community and wider system working together to deliver ambitious plans at pace.
- Influential in future plans through positive internal, external and partner relationships.
- Experience of stakeholder management in complex, changing and political environments.
- Skilled at building and working with alliances across a range of stakeholders.
- Experienced at influencing effective change and development with commissioners, politicians, governing bodies, media and other equivalent stakeholders.
- Has the stature and credibility to influence clinical, management and Board colleagues to deliver the service strategy.

## Business Development

- A lateral thinker, able to recognise the innovation and contribution of others and to make sound judgements that may have a critical impact on the company.
- Familiarity with the requirements of the National Programme for IT in the NHS.
- Experience of working within an executive team leading significant transformation and innovation in an inspiring, engaging, credible, and aligned way whilst continuing to deliver the best possible care for our communities.
- Ability to influence and negotiate at a high level on behalf of the organisation and the sector.
- Digital/IT transformation experience.



## Attributes and Qualifications

- Educated to degree level or equivalent relevant experience.
- Accountant (ACA, CIMA, ACCA, IPFA or similar).
- Evidence of continued professional and management development.
- NHS, health and social care or public sector experience.
- Consultative and advisory in approach, influencing and negotiating with credibility engendering respect, trust and confidence.
- Passion for the delivery of care by competent, empowered and caring staff.
- Excellent interpersonal and negotiation skills, tact, political awareness, and diplomacy and ability to build and maintain positive working relationships with colleagues and other key stakeholders.
- Authentic communicator, naturally engaging.
- Performance-driven, innovative, leading change and improvement.
- Flexible, calm, well organised, and able to prioritise.
- Self-motivated with a work ethic that delivers results.
- Resilient, with a positive approach to overcome challenges and deliver change.
- Able to travel within the Plymouth area and the UK, with the flexibility to work across our settings and remotely.

## DESIRABLE

- Experience of social enterprise.
- Relevant wider, higher management training and qualification.
- Track record of working with partner organisations including the local authority and voluntary sector and in a multi- professional environment.
- Experience of managing additional operational functions or management specialities.
- Understanding of NHS policies, structures, relationships and business dynamics.
- Understanding of private/public sector business negotiations and contract management (PFI/ franchising/competitive tendering/outsourcing etc.).
- Interest in information management as a key resource for improved health and social care delivery.

## WELCOME NOTE

*Dear Candidate*

*Many thanks for your expression of interest in our Director of Finance role.*

*Livewell Southwest is one of the largest social enterprises in England delivering health and social care services through our committed and professional staff and partnerships. We are a forward-thinking organisation delivering a unique and growing range of services across Plymouth, South Hams and West Devon as well as some specialist services for those living in Devon and Cornwall, working as part of the NHS family.*

*We work in partnership with those commissioning and providing health and social care services locally, regionally, and where appropriate nationally, and have strong collaborative relationships and commitments with Plymouth City Council, local and regional commissioners, Health Education England and community and voluntary sector organisations. We are proud partners of both Plymouth University and Plymouth University Peninsula School of Medicine and Dentistry (PUPSMD). We are full partners in the Devon Sustainability and Transformation Partnership (STP) and proud to represent the NHS in our area, working closely and in partnership with University Hospitals Plymouth NHS Trust and Devon Partnership NHS Trust.*

*Equality, diversity and inclusion are all integral to our organisational ethos and values. It is important to us that our workforce represents as closely as possible the diversity of the communities we serve.*

*As an organisation supporting community health and social care we aim to be successful, sustainable and recognised as an example of best practice through exemplary leadership, integrated models of care and expertise. We put people at the centre of what we do and we seek to identify, nurture and develop them at every opportunity. We are focused on continuing to innovate our service and to develop our workforce to meet the future needs of our communities, true to our purpose to be the very best at helping people live well.*

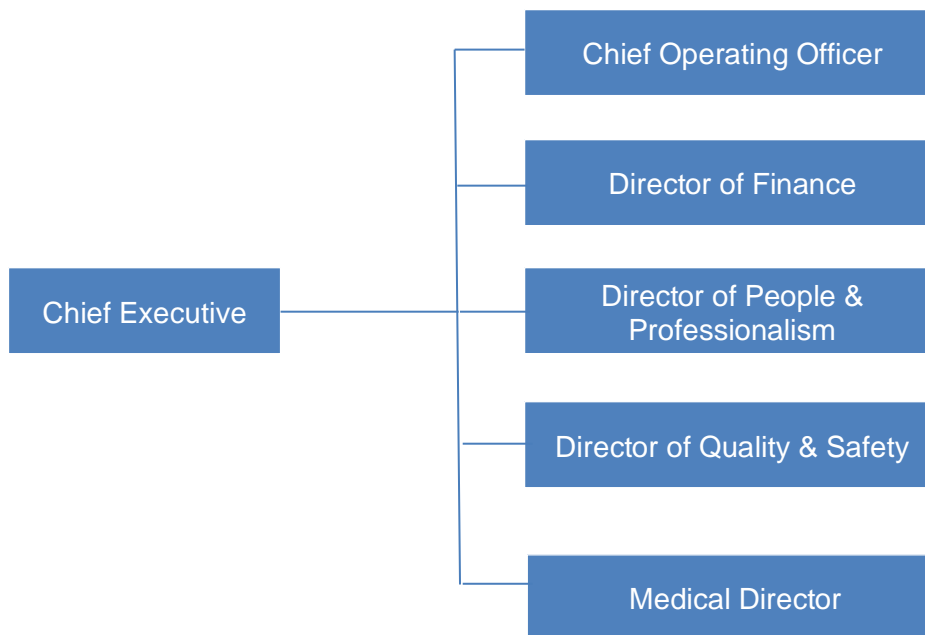
*Our mission is to support people to lead independent, healthy lives and we aim to deliver this through our values of being kind, respectful, inclusive, ambitious, and responsible. With this in mind we are looking for someone exceptional, an influential and experienced accountant with finance and risk management credentials who can join our team in leading our organisation to best serve our staff, people, partners and community in a forward-thinking and innovative way. They will need to recognise the challenge and opportunities to make a difference now and into the future. Making the most of these to deliver our vision to be the very best.*

*You will need to demonstrate values-based leadership, the highest integrity and financial acumen to be the right fit for this role. If influencing the future position of an organisation in a transformational way is your passion and expertise, we would be delighted to hear from you.*

*Best Wishes*

*Adam Morris - Chief Executive*

## STRUCTURE



## RESPONSIBILITIES

- To work with partner organisations, patients, and the public in a collaboratively and creatively way to solve complex problems that cross boundaries and systems to provide a better experience of health and social care for people using our services.
- Ensure that our organisation meets its corporate, governance, clinical and contractual obligations and fulfils its functions according to its policies and procedures.
- Ensure that service delivery and development is taken forward in partnership with people using our services, their carers and families.
- Ensure that our organisation culture promotes health and wellbeing in line with national policy and local commissioning intentions.
- Deliver on our obligation to achieve a balanced position at year-end and delivering services that maintain high quality and value for money.

- Participate in the on-call rota.
- Train as an improvement practice coach and support the development and successful implementation of improvement methodologies.
- Be pro-active in the use of social media to share information, ideas, organisational messages and other content.
- Provide high profile, effective leadership across the organisation and delivery in each of the associated strategic areas.
- Take responsibility for the management of all the pay and non-pay resources within the associated areas including the management of staff.
- Keep the Board informed of strategies, actions taken and any significant issues or risks promptly.
- Contribute to the development of performance reporting and develop indicators for all areas.
- Ensure effective liaison with stakeholders concerning the associated strategic areas.
- Provide strategic financial and business leadership and planning establishing and implementing corporate financial frameworks (financial information, reporting, control and performance) to ensure statutory requirements and targets are met.
- Work with all financial external bodies on behalf of our organisation including Revenue and Customs, banks, regulators, auditors, and insurers.
- Ensure operational compliance with standing orders and standing financial instructions, audit compliance and value for money.
- Provide clear, relevant, timely, and accurate financial and performance advice and support to Board members in line with the best financial practice.
- Develop, maintain and advise the Board upon financial risk management procedures, systems and controls and, where appropriate, take action to address potential areas of concern.
- Develop and lead the implementation of financial management and integrated business strategies to support the development of strategic and business partnerships across the public, voluntary and commercial sectors.
- Ensure the Board is proactively advised about all key financial proposals, providing clear explanations and ensuring an accurate and fair view is presented.

- Lead the production of the Annual Accounts, statutory and other financial returns and publications.
- Ensure the effectiveness of financial management and accounting services, including the timeliness and accuracy of payments to suppliers, control of cash, management of debtors and billing functions.
- Promote and personally support the financial awareness and budget management training of managers and clinicians to ensure non-finance colleagues can deliver their income and cost control responsibilities.
- Ensure that adequate resources are provided to meet the needs of the organisation, people, equipment, facilities and services.
- Secure arrangements for delivering effective information management and technology services to support all aspects of the organisation.
- Develop the IM&T strategy and provide leadership to this function.
- Develop Business Intelligence services to ensure information is accessible for performance management and monitoring, using recognised benchmarks to assist with this.
- To work with the Chief Executive and other executive directors, to identify opportunities for expansion of services including tendering opportunities.
- Work with clinical teams to produce, refine and present business development plans for presentation and agreement at Board and with external commissioners.
- Identify additional opportunities for non-NHS funded work.
- Link with national learning and social enterprise networks to maximise the uniqueness of the social enterprise contribution to the healthcare delivery market.
- To promote the vision, values and objectives of Livewell and take an active role in developing our organisation's strategy.
- To continuously improve, change and develop our organisation, generating and recognising solutions and developing a culture of continuous improvement.
- Ensure that the organisation meets its contractual requirements within the agreed budget following standing orders and Standing Financial Instructions.
- Work with the Chief Executive to ensure an efficient and time performance management process which enables our organisation to deliver against agreed contracts, service level agreements and specific targets.

- Empower frontline staff to provide innovative, high quality, patient centred services.
- Provide leadership to staff particularly in those functions the post holder is responsible for.
- Work with Board colleagues to ensure the knowledge and skills of clinical and non-clinical staff are maintained and developed and that a comprehensive performance appraisal scheme is in place.
- Ensure that appropriate structures are in place for the Finance, IM&T and Business intelligence functions to provide support to the director and other executive directors and ultimately the achievement of directorate objectives.
- Comply with good employment practice and ensure this is extended to teams in accordance with policies.
- Lead, manage and develop senior staff within teams to create an open, supportive and positive culture for team working across organisational, directorate and professional boundaries.

## HOW TO APPLY

### Director of Finance

Follow these steps to apply:

- 1) Provide a copy of your current CV.
- 2) Provide a covering letter outlining how you meet the essential criteria and attributes for the role.
- 3) Ensure applications are received by Monday 27<sup>th</sup> July 2020 by 5pm.
- 4) Email your CV and covering letter to [jane.yeates@yjandw.com](mailto:jane.yeates@yjandw.com)
- 5) Consider availability for 18<sup>th</sup> August 2020 for interviews and assessment. Interviews and assessments will follow social distancing guidelines and Livewell policies with parts of the process held online where appropriate.

## CONTACTS AND INFORMATION

For an informal discussion about the Director of Finance role please contact:

Jane Yeates (Recruiting Consultant) - [jane.yeates@yjandw.com](mailto:jane.yeates@yjandw.com)

- Phone 07958 708747