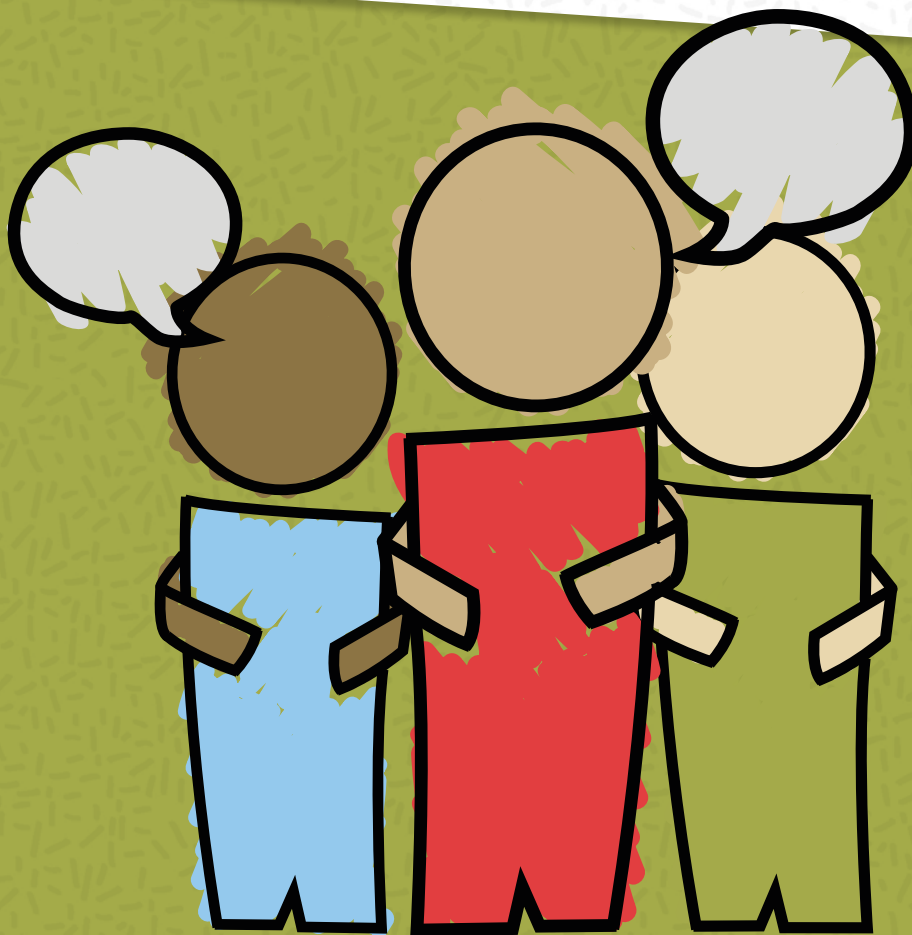


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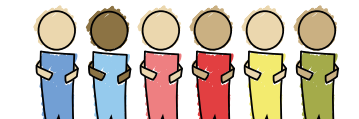
# NHS FINANCE CAREER STORIES

Volume 2

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**FUTURE  
FOCUSED**  
FINANCE



MAKING PEOPLE COUNT

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# NHS FINANCE CAREER STORIES

99

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# INTRODUCTION

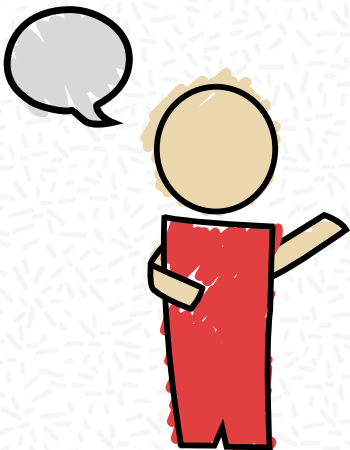
In 2015, Future-Focused Finance (FFF) and the Healthcare Financial Management Association (HFMA) published a collection of NHS finance career stories to highlight different career pathways and the attractions of working in NHS finance. The series of 25 stories captured a diverse mixture of careers and was very well received. It has been widely shared across the NHS finance community and beyond. It is still available via the FFF website – [www.futurefocusedfinance.nhs.uk/career-stories](http://www.futurefocusedfinance.nhs.uk/career-stories).

FFF have created this second volume featuring 12 new stories to further promote the opportunities and different experiences that NHS finance has to offer. The stories highlight the ability to have a successful career at any level and the many opportunities for wide-ranging personal and career development.

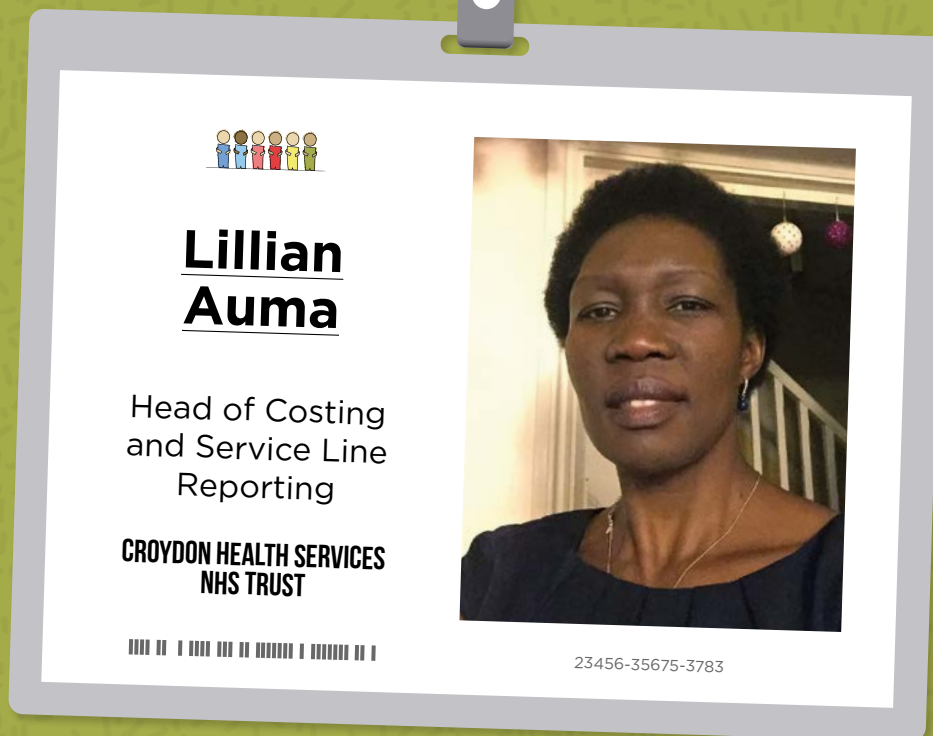
The stories cover the career progression of finance colleagues across all bands. This edition also includes the journeys of two colleagues from Finance Director to Chief Executive, to show what further opportunities finance can offer beyond director level. This publication will be of interest to a wide range of audiences, not just from within the NHS, but also to students and graduates, those in the wider public sector, and commercial sector employees.

The career stories included have either been written by the individuals themselves or, in one or two cases, they have been written up by the FFF Team following telephone interviews. In every case, they represent the individual's reflections on their career to date.

FFF are always happy to receive stories from anyone that works within the NHS finance function or has done so previously. If you're interested in submitting your own story for future editions, please email us on [futurefocusedfinance@nhs.net](mailto:futurefocusedfinance@nhs.net).







Lillian Auma is Head of Costing and Service Line Reporting (SLR) at Croydon Health Services NHS Trust. She moved to the UK from Uganda in the 1990s and decided to look into a career in accountancy. Lillian arrived without any qualifications so began studying ACCA and passed her exams in June 2003. Arriving at the UK and not knowing where her career would take her, Lillian says that accountancy came first before the NHS, “having a qualification gave me a job to apply for.” A life changing illness, from which she recovered with help from the NHS and its staff, inspired her to look into a career in NHS finance. “I thought that if I was well enough to work after I recovered, then I needed to give back to the NHS, as they saved my life.” Lillian said she also found the NHS an attractive employer as it had stability and was family friendly, which was important to her as she had a young baby at the time of applying for jobs.

Lillian landed her first finance role in 2003 at Croydon Health Services NHS Trust as an Assistant Management Accountant. As she had no previous experience in an NHS Finance role, she was only then able to complete her log book as part of her accountancy qualification, which meant she eventually became ACCA qualified in 2005 after two years in the role. Lillian then left Croydon to move to Barts Health NHS Trust as a Management Accountant. She worked in that role for a year and a half before moving into the costing team. This was when Lillian got her first taste of costing and the opportunities and experiences that it offers. After three and a half years in the role, she left Barts and worked in several other London trusts before moving back to Croydon in 2016 as Head of Non PbR

“ I ENJOY COSTING THE MOST AS WE ENGAGE FREQUENTLY WITH CLINICIANS, AND WHEN WE SIT DOWN WITH THEM IT HELPS YOU LINK WHAT YOU’RE DOING WITH PATIENTS. ”

Income. In May 2018, Lillian was appointed to Head of Costing and SLR, which is the role she currently holds.

### ENJOYABLE ASPECTS AND CHALLENGES

Lillian says that she has found her costing roles the most interesting and enjoyable throughout her career. “I enjoy costing the most as we engage frequently with clinicians, and when we sit down with them it helps you link what you’re doing with patients. Being in finance, you sometimes forget what the numbers you’re looking at mean, so this type of role brings it all back to the patient and the organisation as a whole.”

However, Lillian explains that costing is sometimes still seen as a ‘back-office function’, which she finds challenging, as she has the responsibility to get the whole organisation engaged. “It’s important that myself and the team drive that message forward to ensure that costing has got the potential to inform the decisions made in our organisation. If we know the costs of what we’re delivering, then we can make good informed decisions, expand services and find savings and efficiencies, which is so important.”



## HIGHLIGHTS AND LOWLIGHTS

Lillian explains that her journey through costing has had its ups and down, more specifically during a period of time where an organisation she was working for was not engaged at all. Lillian says she faced a year of push-back and barriers on a daily basis, which made her feel demotivated and frustrated. This was until a new Costing Manager joined the trust and challenged Lillian, helping her to develop and build confidence. “He pushed me to come to the fore and demonstrate my skills and knowledge. At that time I struggled with presenting data, but he pushed me and helped me to realise my potential and I’ve never looked back since. He helped me get through a challenging time, but the outcome was a real highlight for me.”

## MENTORS AND INFLUENCES

Lillian says that mentoring has had a huge impact on her career and that the opportunity is invaluable. “I can’t say enough about mentoring. If you get a good mentor it can make a big difference in your career: it did for me.” Lillian was mentored by an Associate Director of Finance based at Guy’s and St Thomas’

NHS FT who helped her move from a Band 7 role to Band 8b. “He made a big impact on my confidence. I usually like to blend into the background and not put myself forward, but through working with him and planning where I needed to be, I achieved my goal within a year.” Lillian says that she is now interested in becoming a mentor herself. “The benefits for me were great. Usually you have the skills, but you just need that confidence boost and I’d like to help others with that.”

## LOOKING FORWARD

Lillian enjoys her current role and explains that there is a lot going on in patient level costing. “I’m looking forward to seeing how this makes an impact for our trust in the next couple of years.” With her team, Lillian is currently setting up a new Patient Level Information and Costing system as part of the NHS Improvement Costing Transformation Programme. “I’m excited to see where it takes us and how it makes changes in the tariff. Croydon is an integrated hospital so we’re also looking at implementing acute and community standards, plus other elements such as education and training, and research and development. So, there are lots of interesting things happening.”

## REWARDS OF WORKING IN NHS FINANCE

Lillian says that the support and networks you have access to in NHS Finance are excellent. “There is a good network of finance professional that you can reach out to, especially within the costing community. If you ever need help or support, there are so many people you can contact to share ideas with.”

Most importantly, Lillian finds the job satisfaction she gets is the most rewarding aspect. “If I didn’t like what I did then I wouldn’t do it. I see my first role as a Mum and if I didn’t get the job satisfaction that I do through working in NHS finance, then I simply wouldn’t do it and would stay at home with my children.”

Lillian has three children and her 17-year-old son has special needs. He receives regular support and services through the NHS, for which she is very grateful: “Compared to how it would have been for my son growing up in Africa, it really makes me appreciate how great the NHS is. In Africa, if you aren’t able to afford health services then you basically die.”

Having a good work / life balance is important to Lillian, as family comes first for her. “It’s a family-friendly environment to work in and the rewards and benefits are fantastic. You can have the opportunity to get flexi-working and child-care support, plus the NHS is stable compared to the private sector, and you can plan your life around that.”

## OUTSIDE OF WORK

On a voluntary basis, Lillian is learning to become a yoga instructor. Once qualified she would like to teach yoga in schools and retirement homes to help children with special needs and elderly people with mobility problems.

### Favourite film

Pretty Woman.

### Favourite book

Anything by Obama.

### Top three records

Luther Vandross – Dance with My Father; anything by Lionel Richie and John Legend.

### Favourite food

Thai.





## Ian Baines

Associate -  
Transformation

**NHS HORIZONS**



23456-35675-3783

I left University in 1992 with a Politics and Economics degree, with little idea of my place in the world and stumbled into a temporary contract at South Lancashire Health Authority as an Assistant Information Officer. With the encouragement of the Chief Nurse, but little further thought, I applied for the Financial Management Training scheme and was successful in gaining a place at the West Midlands Regional Health Authority (RHA). So, there I was in 1993, allocated to the George Eliot Hospital in Nuneaton, a young and naive 'finance trainee' ready to embark on a career as an accountant.

Looking back, I'm not sure I had any idea of where my future career would take me. I cannot claim to be socially driven or have an in-built drive around public services, but I found my motivation in wanting to meet expectations and do well in the role. The training scheme taught me the basics although I don't believe it moulded me to how I see the profession. On completion I gained a place as a Service Unit

Accountant at Good Hope Hospital, Birmingham. As a standalone Trust in the mid to late 1990s, Good Hope provided an opportunity for me to work with clinicians and senior managers and test my new-found skills.

In 1998 I moved to KPMG. Whilst the 'glamour' of a glass of wine at the recruitment event and a cream cake at the interview may have been factors in my decision, I knew at that stage that I wanted to test myself in the private sector, and much to people's amusement my audit placements through the training scheme were the ones I derived the most satisfaction from. It was a period of my career I thoroughly enjoyed - being in different places every day, fostering new networks and learning how governance works within public sector organisations. The NHS trained me but KPMG influenced and shaped my personal approach to the profession.

After five years and three promotions, I left KPMG for South Birmingham PCT as Head of Finance and Governance. It was an unplanned career move based more on 'natural' turnover of close friends and colleagues at KPMG. I just felt it was 'time to go' and South Birmingham PCT provided that opportunity. A year later I found myself in discussion with Andy Hardy, now CEO of University Hospitals Coventry & Warwickshire. We had previously been trainees together at the George Eliot Hospital and I had completed some KPMG Audit work with Andy when he had been working at the West Midlands RHA. Andy was newly appointed as Director of Finance at the Trust and was looking to put together his team. I was interested and applied for the role of Associate Director of Finance - Planning and Strategy. Andy had a philosophy of

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getting the 'right people' into his team and then developing them in role. I enjoyed this approach and it gave me a sense of freedom that I had experienced and thrived in at KPMG. I did all sorts: fronting up due diligence work with regard to the impact of the PFI on the Trust's finances; helping to shape Board reporting; Foundation Trust modelling; moving the finance department to new offices; and even a secondment for nine months to work as Finance Director to an 'NHS Quango' with Jackie Daniel (now Dame Jackie Daniel – someone who combined integrity and tenacity with a genuine interest in the people around her).

In 2008 I left UHCW and joined the newly created Dudley and Walsall Mental Health Partnership Trust as Director of Finance, IT and Estates. It was a move fully supported by Andy Hardy at the time and I still value his counsel today (usually over a glass of wine).

The new Trust had been formed to bring a focus on improving mental health in the area. It was a wonderfully creative time working with a new team to take the Trust from a disparate group of services to a high performing and valued organisation in a matter of years (a reputation it still has today). I had a fabulous

Deputy Director of Finance, Dinah McLannahan, and I took a genuine delight in seeing her develop and grow in role. Dinah basically took the Finance Department from me and freed me up to do other things, including supporting the Chief Executive on the strategy for the Trust, developing the IT infrastructure and improving the Trust's estate. The Chief Executive, Gary Graham, influenced me enormously – cultivating an interest in developing an organisation and the underlying trust that a high performing team needed to have. The improvements made to services were considerable and it was also the point at which I came closest to the services, often spending time with them to work through issues of resources and estate.

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I COULD ALSO SEE THE IMPACT OF WHAT WE WERE DOING - SLOWLY THE CCGS CAME TOGETHER, SICKNESS RATES DECLINED, STAFF SATISFACTION IMPROVED, TURNOVER REDUCED, RECOGNITION OF COLLEAGUES WENT THROUGH THE ROOF AND THE ATMOSPHERE OF THE CCGS WAS CONDUCIVE TO DEVELOPMENT.

In 2013 I left and joined Walsall Healthcare as Director of Finance & Performance. It seemed a natural step having some familiarity with the Walsall 'patch' through my role in the Mental Health Trust. The Trust soon went through a rapid period of turbulence: huge rises in emergency admissions; a failed IT implementation; rapid turnover of senior staff; and a deterioration in the financial position.

My style, based on people, aspiring to potential and reflection, simply did not work in this environment and I found it very hard going. After a number of months trying to be something I wasn't I started to seriously question if being in Finance, and being a Director of Finance was really for me. In 2015 I knew it was time to leave but I had little idea of what should be next – the 'career' aspect was suddenly less important, I was burning out and I knew I had reached the point where I was questioning my ongoing commitment to the profession and even my skills

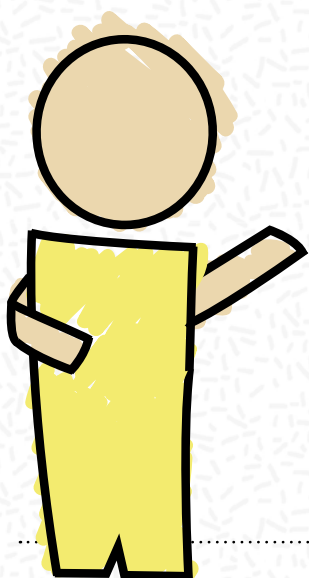
within it, but what was I going to do?

To raised eyebrows from a few people I applied to become Chief Financial Officer of a CCG in significant financial turmoil – South East Staffordshire. It was something so completely different to the Acute Trust environment, but I

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always knew it would probably be short term whilst I worked out what I really wanted to do. Following the announcement of a 'three way' CCG integration I enacted a difficult conversation with the incoming Accountable Officer about wanting to 'do something different'. Within weeks I was being lined up to work with a national (and international) Organisational Development Consultant to work on bringing three CCGs together and the integration of the management teams. New vision, new values, open dialogue, single governance structures, wellbeing, mentoring, mental health promotion, staff engagement, career counselling, staff awards, management development programmes. What was I getting into? The low point of this personal change came in January 2016 as I sat at Reading train station with my head in my hands. About to embark an introduction to OD course, I wondered what the hell I was doing. Was I really going to abandon over twenty years of working in or around NHS finance? Director of Organisational Development? Really?

Slowly I grew into my 'non' finance role. I recognised the importance of my reflective style in helping others, realising their potential and forming links across a smaller but engaging network of OD and leadership professionals. Not only that but I was enjoying it and before I knew it I was also changing – supporting the people around me became my focus and I was hungry for more. I invested in myself and paid for an OD practitioners' course – learning concepts and then putting them into practice in the workplace.





This new thirst for knowledge continues and I'm now completing a graduate certificate in OD. I could also see the impact of what we were doing – slowly the CCGs came together, sickness rates declined, staff satisfaction improved, turnover reduced, recognition of colleagues went through the roof and the atmosphere of the CCGs was conducive to development. We took an interest in our people believing that was the best way for them to reach potential and hence impact and improve services for patients.

As my new network grew, so did my input to aspects of work outside the CCGs. I started to get involved with the Staffordshire STP OD workstream working with a committed group of OD professionals through North Staffordshire Combined Healthcare. Through this STP

workstream I subsequently came into contact with a small diverse group of NHS improvement specialists within NHS England – NHS Horizons. NHS Horizons' aim is to spread and scale innovation within the NHS and create spaces that allow change to happen. I became curious as to how my internal work within the CCGs could be translated into improvement on a bigger scale. So, I sit here now on a 12-month contract with NHS Horizons and I couldn't be happier. It is not a risk, it is an opportunity to learn. I have a sense that my work now helps others find space and time to have good dialogue, that I contribute to national programmes on improvement and I feel a connectedness to a group of people that I have not felt in a long time. I have truly left the Finance profession, changed direction and am enjoying new challenges.

## SO, WHAT DO I TAKE FROM THIS?

- ★ Finance careers open doors. You might not always want to walk through them, but they will be there. Look out for them.
- ★ Sometimes you don't know where a career will take you, I never had a plan – but you can take opportunities as they arise and learn and adapt accordingly. Take what you can from these experiences and hold them – they will always be useful to draw upon later.
- ★ Occasionally you may have to take a risk. Whilst risk can be unsettling it can also be a stimulus to your creativity and drive to follow a different path. One which ultimately may be better suited to your skills, interests and passion.

Finally, many of the people I have worked with in the Finance profession have been passionate about improving the lives of others and associated services. I consider it an honour to have worked with many of them. Whilst I may not 'practice' my profession any more I will always retain my membership of CIPFA and recognise the huge contribution the profession and colleagues has had on me and the NHS more broadly.



OUTSIDE  
OF WORK



### **Favourite film**

Grease.

### **Favourite book**

The Moonstone – Wilkie Collins.

### **Top three records**

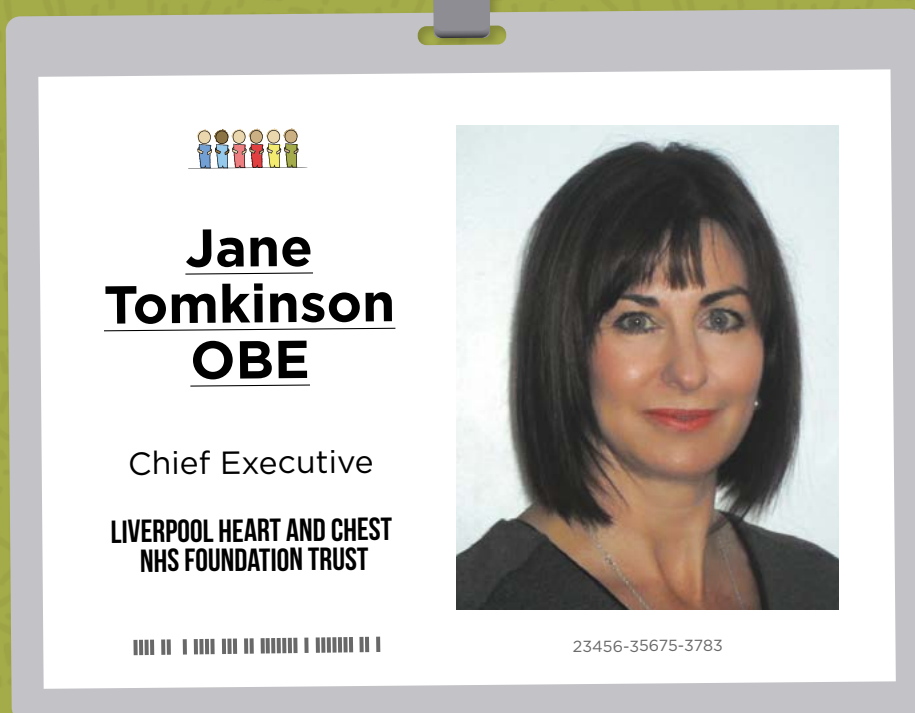
I'm a mad 1950's rockabilly fan and listen to it constantly – there are too many to mention that I lose myself in.

### **Favourite food**

Pizza.

### **Favourite website**

Olympus Cameras and Triumph Motorbikes.



## CAREER PATH

Jane Tomkinson is Chief Executive Officer at Liverpool Heart and Chest NHS FT, a position she has held since 2013. Jane started her career in the NHS in 1990. Working for the NHS wasn't a planned decision for Jane and she explains it as, 'complete serendipity'.

Studying Dietetics at University, Jane decided that it wasn't something she saw a future in, so she applied for half a dozen roles that were available at the time. It just so happened that, of the six, she was offered the chance to be a trainee accountant in Local Government. Since her trainee role Jane has never looked back, "the CIPFA qualification as part of the training scheme was ideal for me, it was really well structured with training and support networks which were very well developed, and although hard work, it was manageable due to that support". During this time Jane became interested in staff development as she learnt a lot about management and leadership – particularly how not to lead. She experienced some bad behaviours and poor practice which made her pledge to herself that, if she was ever in a position to lead others, she would not repeat the way she had been treated. Jane says, "This is something I have aspired to throughout my career".

Starting within the NHS as a Unit Accountant in a combined trust in Sunderland, Jane went into the role, "with expectations about how things might develop, and in reality, it went off in a completely different direction, because what you anticipate about the NHS and the reality are two different things." Jane found from day one that the NHS is very developmental, and

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she was given huge amounts of freedom to develop her role, thinking about how to support the development of patient care services through a strong finance team. She next moved into the role of Divisional Accountant for Surgery at what is now City Hospitals Sunderland, with responsibility for finance staff development. At that point she got heavily involved in the local HFMA branch and took on responsibility for finance trainees. This gave Jane her appetite for developing people but also one for developing herself in a more structured way, which she hadn't had the opportunity to do since becoming CIPFA qualified in 1989.

At City Hospitals Sunderland, Jane was given a much broader remit and eventually took on the role of Assistant Finance Director in 1993, with clear corporate responsibility for finance staff development. Jane says, "This really gave an edge to the role and moved it from it being quite informal to having clear responsibility, to ensure our



finance staff were all fully aligned to the concept of appraisals, objectives and managing performance”.

Jane left Sunderland in 1998 to join Louise Shepherd at Countess of Chester Hospital NHS FT as Deputy Director of Finance. Jane says that her career blossomed under Louise’s mentorship. “Louise was very keen in combining on the job development with something more formal”. Louise really supported Jane’s development and career progression and suggested that she should take on a MBA. “I wasn’t so sure about whether this was possible as I had two very young daughters at the time and a significant job of rebuilding the finance team at the Trust with Louise”. Jane eventually bit the bullet and took on the MBA – completing it in 2002. Jane says, “This really gave me a breadth of thinking and confidence to expand into another role within the Countess, which was Director of Business Development. In those days there was a real focus on bringing work in from other areas and expanding your service offering, very much on the financial side of things. At the time this was much needed, as the Countess had the largest proportionate deficit in the whole country”.

When Louise left the Countess in 2003, Jane was appointed as Finance Director, as the hospital became one of the country’s first ten foundation trusts. Jane held the FD position at Countess from 2004 until 2011 and then went on secondment to the North West then

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JANE SAYS ONE OF THE MANY HIGHLIGHTS OF HER CAREER WAS WHEN SHE WAS AWARDED AN OBE FOR SERVICES TO NHS FINANCE IN THE QUEEN’S NEW YEAR’S HONOURS IN 2016. “I WAS HUMBLLED AND DELIGHTED WHEN I HEARD THE NEWS – IT WAS A GREAT HONOUR AND A PRIVILEGE TO BE GIVEN THE AWARD”.

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North of England Strategic Health Authority (SHAs) as Finance Director. She was responsible for the task of winding down the finances of the PCTs and SHAs across the North. This was an enormous task, as at the time there were large numbers of providers and more PCTs in the North, across a wide geography. “Trying to wind down this system, to create the new one, and to make sure the finances were sharp and delivered the overall control total for the Northern element of the Department of Health, was a massively challenging job, but it gave me the most amazing systems’ experience. It also gave me experience of a role where you need to lead and deliver without direct authority, which has certainly proved very useful in the world of the Sustainability and Transformation Partnership (STP).”

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YOU’VE ABSOLUTELY GOT TO BE GROUNDED IN DOING THE RIGHT THING FOR PATIENT CARE AND FOR YOUR STAFF. IF YOU STICK TO THOSE PRINCIPLES YOU WON’T GO WRONG.

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When the SHAs dissolved in 2013 and NHS England was created, provider regulation was delivered through the NHS Trust Development Authority (TDA), where Jane worked for a period of time. She explains that “this was a really challenging time as there wasn’t any formal structure or blueprint for how the TDA was going to meet the challenge of ensuring more trusts became FTs, and again that policy changed through the course of my tenure there. But it wasn’t a ‘forever job’. In October 2013 I was appointed as CEO of Liverpool Heart and Chest and I have been there ever since”.

## OBE

Jane says one of the many highlights of her career was when she was awarded an OBE for services to NHS Finance in the Queen’s New Year’s Honours in 2016. “I was humbled and delighted when I heard the news – it was a great honour and a privilege to be given the award”.

Jane describes the experience of receiving the honour as “100% left-field” because she had actually nominated one of her colleagues for an honour in that same year. Months after submitting the nomination Jane received a very official looking envelope which she thought was about her colleague, but when opening the letter Jane says, “I couldn’t see my colleague’s name anywhere and I was really blind-sided because nothing could have been further from my expectations. I was absolutely blown away by the whole thing”. Jane explains that she didn’t know who had nominated her and still doesn’t to this day. “Somehow somebody had done this, and it had resulted in a tremendous honour which I feel so humbled about”. One year later, Jane’s colleague “was also very rightly awarded an honour. NHS Finance had previously been really under-represented in the honours list and, given the implications of the roles and the scale and challenges, I’d like to see more colleagues being recognised for the work they do, in absolutely driving forward patient care linked to really strong financial leadership and management”.



## BIGGEST INFLUENCES

Jane says that throughout her career she has worked with many exceptional patients and people across all NHS professions, who have given her advice and support and without this she wouldn't be where she is today. However, Jane says that her biggest single influence has been Louise Shepherd with whom she worked with at The Countess of Chester. "Louise gave me confidence to branch out from a purely financial role as Deputy Director of Finance, to try new roles that were hugely out of my comfort zone. She believed in me which made me believe in myself." Jane and Louise keep in touch to this day as they are CEOs of neighbouring trusts and are working together currently to develop strong clinical care partnerships. Jane says, "our relationship has continued and has really enhanced our ability to make changes for the good in Liverpool as we have that very strong grounding".

## LEADERSHIP

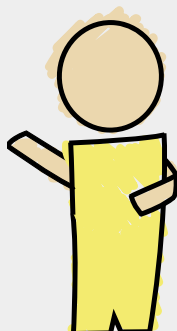
Jane is a woman who is passionate about the NHS and driven by her own values and principles. She advises that anyone working in NHS finance should stick to their values too. "You've absolutely got to be grounded in doing the right thing for patient care and for your staff. If you stick to those principles you won't go wrong". As a leader, Jane still pauses many times a day to question her own decisions and make sure that whatever she is doing is going to do something positive to enhance patient care or staff experience.

Jane's advice to anyone considering a career in NHS finance is to be brave and outward looking and to not put yourself into any form of box. "Be open-minded, grasp opportunities and take advantage of coaching and mentoring. Network, network, network, because through that you will get support, advice and challenge, and will become a much more rounded professional."

Jane says that she would recommend a career in NHS Finance without hesitation. "You have the ability to have such a positive influence on patient care. You'll be exposed to information and situations and development opportunities beyond your wildest dreams".



OUTSIDE  
OF WORK



### **Favourite film**

The Way We Were – Robert Redford is beyond divine.

### **Favourite book**

The German Boy, Patricia Wastvedt writes brilliantly.

### **Favourite TV series**

Versailles, I'm looking forward to series three.

### **Top three records**

'Breathe' Pink Floyd, 'Haitian Divorce' Steely Dan, '17' Janis Ian (I am a bit of an old rock chick).

### **Favourite food**

Soup, any kind.

### **Favourite website**

White Company, loveliness epitomised.





## Aaron Cummins

Chief Executive

UNIVERSITY HOSPITALS  
MORECAMBE BAY NHS  
FOUNDATION TRUST



23456-35675-3783

### RUGBY LEAGUE TO THE NHS

Aaron Cummins is CEO of University Hospitals Morecambe Bay NHS FT. He began his NHS journey in 2000 as a graduate finance trainee. He started later than his peers as he began his working life with the ambition to play professional rugby league until an injury meant that he had to stop. After researching alternative career options Aaron enrolled at Manchester University to study Law. At the end of his studies Aaron realised that he enjoyed Law as a discipline, but as a career choice it felt isolating. "I'd always had a sense of wanting to belong to a team and contributing to something bigger. Being a solicitor just didn't do it for me." The NHS felt right so he applied to the NHS Graduate Training Scheme and was delighted to be accepted.

His first placement was at the Royal Liverpool and Broadgreen University Hospitals NHS Trust (RL&B) where he was mentored by the then Deputy FD, Sheila Fowler, with whom he is still in touch today. "Sheila is one of the NHS finance function's great leaders and she had an enormous impact on my early career." During his four years at RL&B, Aaron had a fantastic opportunity to work in various departments and healthcare organisations across Liverpool, really developing his understanding of the NHS and then becoming CIPFA qualified in 2000. To demonstrate the importance of getting out and talking to clinical and operational colleagues, Aaron recalls a memory from early in his training where a colleague, realising that Aaron was from finance, took the opportunity to draw his attention to the dangerous exposure

of fluids in his department by almost knocking him unconscious with a jar of ether. He pointed out that he could easily blow up the top floor of the building due to the lack of proper storage facilities. From that day on, Aaron says he adopted a philosophy of, "getting out on the ground and speaking to staff, rather than operating out of an office and 'behind a screen'."

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Aaron says he  
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GETTING OUT ON THE GROUND  
AND SPEAKING TO STAFF, RATHER  
THAN OPERATING OUT OF AN  
OFFICE AND 'BEHIND A SCREEN'.

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### BIG AMBITION

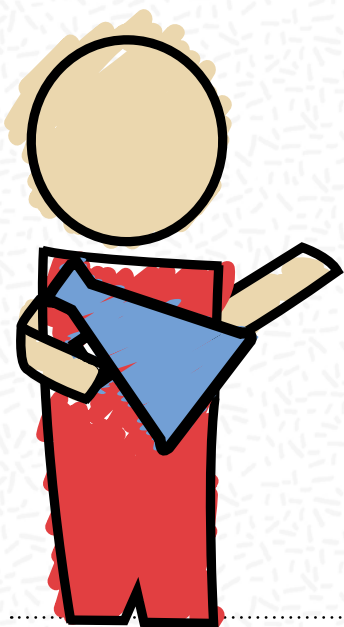
Once qualified, Aaron moved into a role at the Mersey Internal Audit Agency (MIAA). Working in audit gave Aaron the opportunity to work on governance, assurance and risk projects, to which most people aren't exposed until they reach director level. This gave him a grounding in organisational leadership at an early stage, which he says has been hugely beneficial for his career and helped further his ambition to one day become an NHS CEO. "If the culture and the quality of its people are the heartbeat of an organisation then good governance and assurance systems are its circulatory system."



After working at MIAA, Aaron applied for the Head of Management Accounts position at the Robert Jones and Agnes Hunt Orthopaedic Hospital (RJA). He didn't get the job but had made an impression on the then Finance Director, Heather Lewis, who offered him a Corporate Accountant role instead. "I've been lucky throughout my NHS career," says Aaron. "I've often been in the right place at the right time, and this was one of those moments. I'm incredibly grateful to Heather for that opportunity." During his time at RJA, a set of unusual circumstances occurred that meant that the finance team had to complete the final accounts process over a few days, including a weekend, a process which would ordinarily take weeks. "This was the time I realised that working with teams and leading under pressure was absolutely what I wanted to do in my career. Dealing with pressure, managing risks, motivating teams, helping people solve problems and delivering to a deadline, were all validation for the kind of role I wanted to do in future." Shortly afterwards, the Deputy FD role came up at RJA, which Aaron took on an interim basis. He describes this time as, "the steepest learning curve ever." Being a young Deputy, at only 28, he had to build credibility and respect from his colleagues whilst learning on the job and working every evening and weekend for the first few months. Aaron was eventually appointed permanently to the role and stayed for a further three years. "It was a really good specialist tertiary trust where I was exposed to a lot of strategic and director-level experiences early on, which I'm grateful for. I also had the privilege to work with a great team, all of whom worked really hard to support me in the role and taught me a great deal."

Aaron then joined Liverpool Heart and Chest Hospital (LH&C) as Deputy FD in 2007, at the time the Trust was going through the FT authorisation process. Aaron was only in the role for a short period before the FD position became vacant. He was approached to step-up into the position on an acting basis, which he accepted without hesitation. Aaron was eventually appointed to the permanent FD position which he held until 2012 and says it was a challenging, enjoyable and rewarding experience. During this period, Aaron

was also appointed as the national chair of the Foundation Trust Network, which is now NHS Providers. This introduced him to an entirely new world of politics, policy, influence and national agendas. "I really enjoyed my four years as chair, it was a fascinating insight for me to a world that I'd had no previous experience of. I would recommend any finance colleagues to put themselves forward for this kind of role."



## A CAREER-DEFINING EXPERIENCE

In 2012 news was continuing to develop around the issues at Mid Staffordshire NHS FT. Aaron had been at LH&C for over four years at that point and had started to think about his next role. The advert for the FD role at Mid Staffs came out and Aaron says that he couldn't not look at it. With the quality failures and the impact on patients and their families at the Trust being widely reported, Aaron felt a real sense of responsibility to "put his hand up" to apply for the role and try and help where he could. He stayed with the Trust as FD for two years and describes the experience as career-defining. As FD, Aaron had the responsibility, with the wider Board, to help develop long term solutions for the services provided by the Trust. This involved going through the NHS's first failure regime process, as well as ensuring that staff and patients were kept safe and felt involved in the future development of

“IT WAS SIMULTANEOUSLY THE MOST HUMBLING, UPSETTING, CHARACTER-BUILDING AND CAREER-AFFIRMING EXPERIENCE. I WAS ALSO BLESSED TO WORK WITH SOME VERY EXPERIENCED COLLEAGUES FROM WHOM I LEARNED A GREAT DEAL.”

services. Aaron and the executive team also had to deal with the public and families that were impacted by the reports that came out of the Francis review. "I met with lots of patients and families, listening to stories that were heart breaking – a real lesson of what can happen if organisations don't listen to patients and keep patient safety and experience at the heart of their decision making," Aaron says. "It was simultaneously the most humbling, upsetting, character-building and career-affirming experience. I was also blessed to work with some very experienced colleagues from whom I learned a great deal."

## MORECAMBE BAY

During 2014, University Hospitals Morecambe Bay NHS FT (UHMB) were experiencing similar headlines to Mid Staffs around their maternity issues, when the FD role became available. Dame Jackie Daniel was CEO at the time. Aaron had previously worked with Dame Jackie at the RJA, so he went to discuss the role and challenges facing the Trust with her. "It sounded like there was a positive future for UHMB and they had a really strong, patient-focused CEO with a clear vision of the future of services across the Bay. It was an easy decision for me to make, so I applied and was successfully appointed to the FD and Deputy CEO role in 2014 and have been at the Trust ever since." Aaron worked alongside Dame Jackie for four years, predominantly



working with colleagues across the Trust and its partners in responding to the issues raised in the Kirkup Investigation and CQC reports, with the Trust being placed in special measures. Aaron says that most of the finance-related work he's done at the Trust has been about making sure it has strong governance, assurance and oversight and delivering efficiency programmes with a focus on safety, quality and experience. The most important work he did was around the culture of the Trust, creating an environment in which staff wanted to work and in which patients felt safe and well cared for. "We are far from the finished article but I'm incredibly proud of the work of our teams and communities across Morecambe Bay have delivered over the last few years. We are a very different organisation today and have been recognised as such by the CQC in our recent inspections – being rated as 'Outstanding' for the care we provide, and 'Good' overall. This is fantastic feedback for colleagues and patients who have supported that improvement journey."

## BECOMING AN NHS CEO

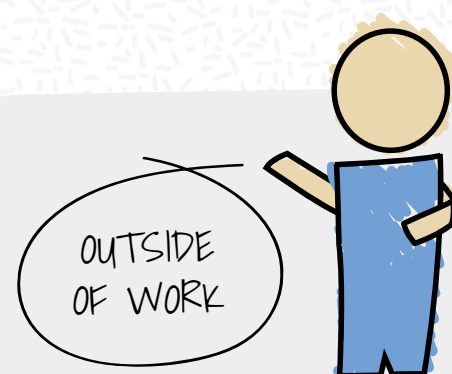
At the end of 2017, Dame Jackie announced that she was leaving the Trust, which meant the CEO position needed to be filled. Aaron jumped at the chance and was successfully appointed in April 2018 after a tough, competitive process. "I have to say a huge thank you to Jackie, the colleague who has had the biggest impact on my career to date. She's been a coach, mentor and a good friend over the last five years. She is a passionate, committed and brave leader and it's been a real privilege to be her Deputy over that time." Aaron started the CEO role on 1st April 2018 and says it is a great and privileged position to hold. "My 17-year NHS career has all been about arriving at this point and I feel blessed to have had the experiences I've had so far."

Aaron has built up a large following on Twitter since starting his CEO role, using the hashtag #NHSCEOfirstyear. Aaron tweets every day, sharing his experiences and daily routines to show what the transition from FD to CEO is really like. This is then rounded up into a monthly blog piece which Aaron writes for the Trust website.

## LESSONS LEARNT

Resilience is one of the most important lessons that Aaron has learnt throughout his career, particularly from his time at Mid Staffs. Aaron says it is important to recognise that when you enter into a tough job with huge commitments, it will take a lot out of you both professionally and personally. "Look to your family and friends for support, make sure you interact socially outside of work and focus on looking after yourself."

Aaron has also learnt about what is really important. "My experiences to date have certainly helped me get really clear on how to prioritise what's important. Patient and staff experience and the quality of care we provide are THE most important aspect of any leadership role in the NHS."



Diet and exercise are important to Aaron and he trains every day at the gym. He is also a loyal Wigan Warriors season ticket holder and tries to get to games as often as he can. Aaron spends most weekends with his children, usually hiking and camping in the Lake District.

### Favourite film

Jaws.

### Favourite book

IT by Stephen King and Good to Great by Jim Collins.

### Favourite TV series

Alan Partridge and Bottom.

### Favourite food:

Pizza.

### Alternative career choice

Apart from a Rugby player, I'd loved to have been a doctor/pilot.

### Top three records

Paul Van Dyk – For an Angel,  
Creed – Arms Wide Open,  
Train – Drops of Jupiter.

## REFLECTION ON NHS FINANCE

Aaron says that his professional qualification and finance career has got him to where he is today. "I would not be a CEO without having followed that path. The finance community and its support are second to none and I will be forever grateful to them."



## FROM PHYSIOTHERAPY TO ACCOUNTANCY

“Never will I be an accountant,” Debbi used to say, growing up with two accountant parents who were convinced that she would. Now in 2018, as Deputy Head of Strategic Financial Planning at Bolton CCG, her parents can safely say, “We told you so.”

Whilst Debbi always knew that she wanted to work in healthcare, the path into NHS finance was by no means a planned career journey. Throughout school and college, physiotherapy had always been the plan; however, reflecting on her time studying physiotherapy at university, Debbi said, “I loved being at the hospital and helping the patients get better but always felt I wanted to have a bigger impact, rather than just helping one patient at a time.” It was here that Debbi realised that physiotherapy was actually not the right career path for her, but at this stage did not know what she wanted to do instead. When discussing the highlights and lowlights of her career, Debbi recognises that this was probably one of the hardest times, feeling lost after realising something she always dreamed of doing, was not quite the right for her.

Following her university graduation and qualifying as a physiotherapist, healthcare was still the plan even if not in physiotherapy. Spending the next couple of years working in home-care and running a J.D Wetherspoon pub allowed Debbi some time to reflect on what she wanted to do long term. It was during this period that she discovered the NHS Graduate Scheme and decided to apply. Although unsuccessful the first time she applied, she gave it another go the following year and

started the scheme in 2012; the journey to becoming an NHS accountant had begun. Debbi says that picking the finance scheme, “was more of an ‘I might want to be an accountant, or I might want to be a general manager’ decision, rather than a clear plan and to some extent I am still at that point six years later.” Picking finance over the general scheme on application, she recognised that you can be a general manager with a finance background, but not the other way around.

## THE NHS FINANCIAL MANAGEMENT GRADUATE SCHEME

Debbi spent the majority of her time on the Financial Management Training Scheme at Wrightington, Wigan and Leigh NHS Foundation Trust (WWL), alongside placements at NHS Bolton CCG and The Trust Development Authority (TDA). Debbi found that the scheme offered a unique range of experiences and opportunities that are not offered routinely to everyone. Going out in an ambulance with the North West Ambulance Service, spending time as a porter, observing in theatres and shadowing executives, were just a few of the experiences that Debbi gained on the scheme. When reflecting on this, Debbi says that her orientation period, “gave me a massive appreciation of these staff members having worked alongside them – you got to talk to them as people and not just about finance, budgets or performance. It was also massively helpful in building relationships – an important skill to have as an accountant working in the NHS.” One of Debbi’s greatest experiences in the NHS came through building a relationship with an orthopaedic consultant at WWL, which led to her being taken as a



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DEBBI'S BIGGEST INFLUENCE IN HER CAREER HAS BEEN HER MENTOR, WITH WHOM SHE HAS WORKED SINCE BEING ON THE GRADUATE SCHEME.

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theatre assistant on a 10-day medical mission, to deliver orthopaedic care in Sierra Leone in December 2013.

Debbi really valued her time on the graduate scheme where she took on as many of the opportunities offered as possible. She built up her networks and made the most of the support from her mentor as well as her placement and training managers. Having had no previous financial experience, it was a real achievement for Debbi to pass all 15 exams on the scheme first time round, even getting a commendation for 5th in the world for one of her strategic level CIMA papers. Now six years on, and a fully qualified Chartered Accountant, Debbi has worked across acute, regulator, and now commissioning roles within finance.

## CAREER POST SCHEME

Following completion of the scheme, Debbi gained a substantive role at WWL as Deputy Divisional Finance Manager for Specialist Services, where she stayed for 16 months before being approached to apply for a job at Bolton CCG. Debbi has now been at Bolton for two years as Deputy Head of Strategic Financial Planning.

When talking about her role today, Debbi explains how varied it is with no two days ever being the same and the “norm” can range from monthly financial reporting and monitoring, to attending system wide meetings, as well as collaborative working with other organisations – like the council and main provider. Getting out of the office and meeting people is what Debbi enjoys doing most and finds this role allows her that as well as utilising her communication skills – especially when working across organisations.

Debbi's biggest influence in her career has been her mentor, with whom she has worked since being on the graduate scheme, “it has been great to have someone with that senior opinion and guidance as well as to help with my career development and decision making.” When asked about career aspirations for the future, Debbi will continue to grasp at opportunities and see where they take her; “the sky's the limit.” Debbi would next like to manage a larger team of people, maybe through being a ‘Head of’, enabling her to have the accountability and responsibility of looking after a discrete area. Building networks through SDN, HFMA and FFF have been and continue to be extremely useful to Debbi, “the people around me have helped me develop as a person as well as professionally and given me opportunities both in and out of work.”

Debbi is both a Future-Focused Finance Value Maker and Deputy FSD Lead, and says these roles have “helped to motivate everyone in the organisation to recognise what we do in the department and our

impact wider than just finance.” She adds that it has really helped with organisational development by promoting what FFF is doing and getting other members of the team involved in FFF workstreams, as well as getting out to events and conferences. With all the work they have done over the last year with VMs, FSD and becoming the first CCG in the country to get Level 3 FFF accreditation, the team at Bolton are often out sharing their experiences and best practice and focusing on their wider development.

Despite a busy work life, Debbi understands the importance of a work and home life balance and says it is important to prioritise both in and out of work. “You can work hard and play hard.” Being organised, managing her time and prioritising are key to ensuring the balance for Debbi thus ensuring that even at month-end, she's on court on time for her Tuesday tennis matches.

## NHS FINANCE AS A CAREER

Debbi wanted to have a bigger impact on patient care and firmly believes a career in NHS finance can do this, even if it can be hard to see that from “behind the scenes”. Debbi points out that, “finance is involved in everything – you can have an impact from an individual patient scan right up to setting up a new service or building a brand-new hospital. This can be hard to see when you're crunching numbers on a spreadsheet or processing invoices but is important to remember.”

Despite not ending up in a clinical role, Debbi feels that having this background gives her an understanding of how to communicate with non-finance staff and she now knows how to make things understandable which is important in her role. It is not only her role as a physiotherapist that has helped with her finance career; her experience working as a carer in the community also helps her in her commissioning role today. “Working alongside the council and talking about the reablement and the delivery of home care means I can picture how it will look operationally as I have delivered it.” Despite her unconventional career path, it has now all come together, and each role has taught her something that helps her in her current job.

OUTSIDE  
OF WORK

### Favourite film

The Holiday.

### Favourite book

Anything with a bit of romance, a good beachy book.

### Favourite TV series

Death in Paradise, Suits, Big Bang Theory.

### Top three records

Anything Cheesy.

### Favourite food

Lasagne or roast dinner.

### Favourite website

eBay as saving for a wedding but normally Wimbledon – during the tournament. Or social media.





## **Guy Dakin**

Finance Manager

**BERKSHIRE HEALTHCARE  
NHS FOUNDATION TRUST**



23456-35675-3783



Hello, I'm Guy Dakin, I'm a Finance Manager at Berkshire Healthcare NHS Foundation Trust, and a member of the Association of Accounting Technicians. I support the management of the mental health service budgets in the west of Berkshire.

I didn't really know what I wanted to do when I left school. I went to work at a bank. They were handy for taking on those school leavers who showed potential but didn't want to get their hands dirty, like me. I soon started to study for the banking exams. The first part of those studies was to work towards the BTEC National Certificate in Business & Finance. The syllabus covered accounting too and I found that more interesting than banking. So, I left the bank and spent time working in the finance functions of new car

dealerships in the motor trade. I studied in the evenings and became a member of the Association of Accounting Technicians. I went on to study CIMA but kept getting stuck on the tax paper so didn't complete it at the time.

Although I had academic qualifications, a problem was that I was shy, naive and generally "wet behind the ears", so I took on a part-time,

voluntary post in public service. That was the making of me. It really built my self-confidence and I began to enjoy being more outgoing.

A friend of mine joined the ambulance service and inspired me to do the same. I served on emergency ambulances for about five years, first as an ambulance technician then as a paramedic. The two jobs are very similar, they're just different skill levels. It was the

most special job I've ever done. It's such a privilege to be looked to for help at the start of life, at the end of life, and at times in between, when patients least expected something to happen to them. I have memories of what I've seen and done which will stay with me forever.

It's surprisingly useful to be numerate in the ambulance service; e.g. when working with patients' ages, weights and drug dosages, and of course for when claiming your overtime on your time sheet. People from all walks of life end up working on emergency ambulances. I met another AAT member and also a fully qualified ACCA accountant who had both become paramedics. However, I didn't see myself staying there forever - working night shifts and carrying patients. So, I went back to finance.

I managed to land a job as a Management Accountant in the NHS South Central Ambulance Service. Management accounting means you're supporting the budget holders to manage their budgets, and you're working in terms of thousands of pounds. I

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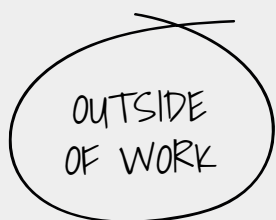
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like it because it's the area of finance which lets you most express your personality. You get to engage with service managers, and my operational experience helps me to empathise with the wider challenges they face. I also enjoy the challenge of looking into problem areas and I like working with spreadsheets.

66 WORKING IN NHS FINANCE REALLY DOES MAKE A DIFFERENCE TO PATIENT CARE. IT'S EASY TO FEEL REMOTE, AND LIKE YOU ARE JUST WORKING THROUGH A 'TO DO' LIST AND THEN GO HOME. BUT WHEN YOU STOP AND THINK ABOUT IT, EVERYTHING YOU DO HELPS PATIENT CARE. 99

Others might prefer financial accounting with its satisfaction from reconciling accounts – I reckon most accountants like the satisfaction to be had from a good reconciliation – but, whatever your preference, it's good to go for any finance job as a way in to a trust, even if it's not the particular area of finance that you're looking for. You'll have the chance to show that you fit into the team and have the right work ethic. Other positions within the wider finance team usually become available as people develop their careers, so you can then apply for those.



**Favourite film**

The Secret of My Success.

**Favourite record**

I'm Still Standing by Elton John.

**Favourite website**

[www.futurelearn.com](http://www.futurelearn.com).

Other benefits to working in NHS finance are that it offers flexible working and what's known as 'Finance Staff Development' (FSD). In reality your access to those can depend on your job and also your line manager, so if those matters are important to you then it's worth exploring at your job interview.

Working in NHS finance really does make a difference to patient care. It's easy to feel remote, and like you are just working through a 'to do' list and then go home. But when you stop and think about it, everything you do helps patient care. Whether it's paying invoices to suppliers, so they keep supplying vital equipment; collecting money from customers so that we can afford to pay staff to turn up and work; or calculating the cost of an innovative new service which would improve the quality of life for patients.

Being an AAT member has served me well in my career. I am a big believer in Continuing Professional Development (CPD) and I like to get involved. The AAT provides a lot of good CPD resources, I especially like the webinars. At work I champion the cause of the 'Time to Change' campaign, which aims to remove the stigma about mental health. My colleagues recently voted for me to become a Staff Governor which involves holding the Board to account and representing the non-clinical workforce. That role has exceeded my expectations.

**SO, I HAVE A FEW  
KEY MESSAGES...**

**FIRSTLY...** voluntary work is really good for development (and is fun).

**SECONDLY...** you don't need to become a fully qualified accountant to have a rewarding career in NHS finance.

**THIRDLY...** CPD is really useful too. A lot of people have given me a chance in my career along the way, it's a long list and I'm grateful to each one of them.

**Good luck with your career, whatever you decide to do.**





We often make the mistake of thinking that there is a linear narrative to our lives: that's to say that we live life in a straight line, making perfect decisions every step of the way. Films & TV series, in which the plot of a person's life unspools in front of us, only enhance this perception.

A glance at my career to date, suggests that – if it's at all typical – then life is actually full of twists and turns that would make no sense at all if you had tried to predict them in advance.

### WHY THE NHS?

In 1988 I got injured playing hockey – I had a blood clot on my left optic nerve after being hit in the face with a ball – and had to spend a week lying on my back on complete bed rest to give the clot a chance to dissolve to ensure that I didn't lose my sight. While lying there I idly wondered who managed hospitals?

### WHY FINANCE?

On leaving hospital, with my 20/20 vision retained thanks to the wonderful ophthalmology team in York Hospital, I applied for the NHS General Management training scheme. I was unsuccessful, but as I left the assessment centre a Northern Irish woman who'd been on my interview panel literally ran after me to tell me that I'd displayed many of the skills needed to be an accountant and asking why didn't I consider that route instead. At the time I was studying for an English Literature degree. I don't think I quite laughed in her face, but it was a close run thing.

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I LIKE TO THINK THAT I WORKED HARD; SHOWED PEOPLE I KNEW WHAT I WAS DOING; AND, CRUCIALLY, THAT I WAS WILLING TO BE A PART OF THEIR TEAM AND LEARN FROM THEM.

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However, impressed that she'd taken the trouble to do that for me, I looked into it. Six months later, I started on the old Mersey Regional Health Authority finance training scheme, doing a graduate conversion course at what was then Liverpool Polytechnic.

### WHAT NEXT?

I completed my CIPFA exams in 1991 and took up a role at Alder Hey Hospital, where my final year's placement had been. I had been careful to develop a good network while on placement. I like to think that I worked hard; showed people I knew what I was doing; and, crucially, that I was willing to be a part of their team and learn from them. I must have done something right as I was offered a role as Deputy Chief Accountant

This was in January 1991. In April/May 1991 Alder Hey, which was one of the first wave of NHS Trusts, had to submit its first set of accounts. I was asked to lead on this. It was a daunting request, but as the whole process was brand-new, I knew as much as most others about what was required. My inexperience was definitely not

a huge disadvantage. We pulled a great team together and delivered a set of accounts that the auditors said were ‘excellent’.

As a consequence, I got a reputation as someone who knew how to bring Trust accounts together and that, in turn, led to my next job, at Warrington Hospital. While I was there my boss went off on maternity leave and I was asked to cover for her: another case of ‘right place, right time’, which I grabbed at with both hands. From there I moved into an Associate Finance Director role at Salford Community NHS Trust, when their first choice for the FD role that I’d applied for on a whim wanted to work part-time and so they asked me to take on an ‘enhanced’ deputy role. Then, suddenly, aged just 29, I found myself as FD at Chester & Halton Community NHS Trust.

## WHAT NOW?

I loved my role at the Community Trust. I learned a lot from some excellent people, and developed a wide network of colleagues from finance and other departments. Many of those people are still good friends now. Sadly, the government decided that Community Trusts were not the way forward as they introduced Primary Care Trusts. As our Trust was divided up across three of the new PCTs I was asked to apply for all three FD roles.

I plumped for the first one that I was offered, thus making the first serious mistake of my career. I won’t name names as it’s unnecessary but suddenly I found myself exposed on all sorts of levels. I will admit that I struggled with some aspects of the new role, including the then new FT contract with its complex terms and conditions. However, what I struggled with most was the ruthless nature of the people above me in the organisation. I began to hate the job. I took my eye off the ball and, inevitably I made some mistakes. Next thing I knew, I had a trumped up ‘disciplinary’ charge to answer: astonishingly, I was asked to continue in my job while being investigated for the alleged disciplinary wrongdoing. I politely declined the request.

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LOOKING BACK, THE ONE CONSTANT IS THE INFLUENCE OF GOOD PEOPLE WITH WHOM I WAS ‘NETWORKED’ AND WHO ALL HAD MY BEST INTERESTS AT HEART. ALL THE TWISTS AND TURNS MY CAREER HAS TAKEN HAPPENED BECAUSE I HAD LINKS TO PEOPLE ACROSS THE NHS.

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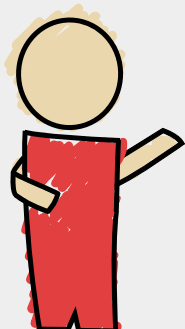
I received huge amounts of support during this period from all sorts of people from across my network. Once the investigation had been completed and I had been cleared of everything except a lack of experience in dealing with FT contracts, I was offered a role by the then SHA Finance Director as FSD manager in his patch. I happily took it on, initially for Cheshire & Merseyside and then for the North West as a whole.

Finally, in 2013, having built up the North West FSD network and initiated Informatics and Procurement networks in the region, I was asked to speak to a colleague in NHS England about working with him on starting up a new national finance development initiative. So it was that I started working on FFF, initially on secondment from the NW and then, as now, as an employee of NHS England.

## SO WHAT?

Looking back, the one constant is the influence of good people with whom I was ‘networked’ and who all had my best interests at heart. All the twists and turns my career has taken happened because I had links to people across the NHS. I took a few chances along the way, some worked out well, others didn’t, but the strong network remained a constant.

OUTSIDE  
OF WORK



### Favourite film

Bladerunner (The Final Cut though, not the original version with the dodgy voice over).

### Favourite book

Philip Pullman’s His Dark Materials trilogy.

### Favourite TV shows

Peaky Blinders, The Detectorists, Only Connect, The Handmaid’s Tale.

### Top three records

These change from hour to hour! Stalwarts would be: something by

New Order (Power, Corruption & Lies, maybe?); something by Nick Cave & the Bad Seeds (their last album, Skeleton Tree, was astonishing); and something by Pixies (Doolittle, probably).

### Favourite food

Authentic Italian.

### Favourite website

Pathetic Motorways ([www.pathetic.org.uk](http://www.pathetic.org.uk)) – have you ever seen such meticulous research into such a banal subject!





## Gayle Wells

Strategic Head  
of Financial  
Management

**MERSEY CARE NHS  
FOUNDATION TRUST**



23456-35675-3783



I've always been 'one of those kids' who volunteered. I helped out at local stables with Riding for the Disabled, was a Prefect, went to 'Camp America' and even single-handedly ran the school branch of the Midland bank! It's a theme which I've taken into the rest of my life, and career, as you'll see if you read on....

### WHERE I STARTED....

I left school with A Levels and went straight to university to complete a teaching degree, to work with primary school children. I'd never even considered a career in the private sector, it wouldn't match my personal values. However, the teaching career was not to happen, I had some bad experiences on placements, particularly my final year 4 placement, which left me demoralised and demotivated to carry on with teaching. So, I finished and took a degree with 'Education Studies' rather than the teaching degree. With pretty much no idea about what to do next, I went to the job centre!

I ended up working at a local home care agency, the type of business which works with local authorities to put nurses and carers in to support people to stay at home and live independent lives. I was essentially a care worker, with a degree.

I don't think my then employer realised immediately, but when she did, she saw an opportunity to use my skills and gave me a role in her main office, as well as continuing to be a carer. It wasn't long before I was supporting her accountant in raising invoices to the local authority and dealing with payroll queries and I started thinking "I could do this."

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THE ROLE REALLY CHALLENGED ME AS THERE WERE TIMES I WAS WAY OUTSIDE OF MY COMFORT ZONE, BUT KNOWING I HAD MY MANAGER'S FULL SUPPORT, AND HAD BUILT RELATIONSHIPS WITH NON-FINANCE COLLEAGUES, IT GAVE ME THE CONFIDENCE TO GROW.

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I knew I couldn't get there just by hard work, I'd need to gain some form of qualification. I set about negotiating a working week which allowed me to still work but go to college and start studying CIMA. At the time I funded myself and invested in myself to make it happen.

Year one was very hard. I struggled with the terminology and couldn't even imagine what a ledger looked like. Although I decided to start CIMA, as it offered a breadth of qualification for any future career, I hadn't given up on my public-sector goals. I saw adverts for the NHS Graduate Finance Scheme in 1999 and went for interviews. I made it to the final stage but was not successful, but I became sure that the NHS was where I was meant to be. Soon afterwards I saw an opportunity in Sefton Health Authority, which I applied for and was placed into a Band 4 Management Accountant role in early 2000.

## MY FOUNDATIONS...

Looking back at this first role, it really provided me with a fantastic foundation. It was in the North West Specialised Commissioning Team and the finance team was two, yes two, people! Me and the Head of Finance. It was a true multi-disciplinary team, working alongside the nurses, case managers and data analysts to commission secure services across the North West of England. I gained a huge amount of experience in a short time as the team was so small, and learned about how important it was to develop relationships with non-finance staff.

## AND THEN...

Progressing through my CIMA studies, I was given more responsibility after each year and I was encouraged by the Head of Finance to look for the next NHS opportunity. I applied for, and was successful at gaining, a role at Wigan Primary Care Trust in 2002. Working in this commissioning role gained me a breadth of experience across public health, mental health, community services, primary care, pretty much every part of the PCT!

My manager in this role was supportive and encouraging, and when opportunities arose for development, of course I said yes! The role really challenged me as there were times I was way outside of my comfort zone, but knowing I had my manager's full support, and had built relationships with non-finance colleagues, it gave me the confidence to grow.

When the PCT ceased to exist in 2013, I was finance lead on the closedown of the PCT and creation of the CCG – a huge responsibility which I really enjoyed. By this point I was Assistant Director of Financial Management at the CCG. Shortly after, and looking for the next step, came the next big change....

## OUT OF MY COMFORT ZONE... AGAIN...

Seeing that a colleague and I were at the same grade and were facing similar development needs, our Director of Finance suggested we job swap for a year. I was to take financial accounts, with zero financial accounts experience, and she was to take financial management, with zero financial management experience.

Risky? Scary? Probably yes to both. It was however the best and most challenging experience. Being supported by a fantastic Director of Finance, I closed down the CCG accounts in 2013/14. Auditors commended the high-quality accounts and the Director of Finance reported to the Audit Committee that they were the best he had experienced in his career.

## ALONG CAME FUTURE-FOCUSED FINANCE...

After such an exciting year, going back into my substantive Assistant Director of Financial Management role felt like a backwards step. I was keen to keep moving forward and keep learning. I remember the day,

walking down the office, when my Director of Finance walked right up to me and said, "That Value Maker thing. The email I've just sent you. That's so you, you should apply, just do it!" and the rest, as they say, is history!

I became a Value Maker in 2014 and won the first ever Future-Focused Finance award in December 2015. I've been really lucky to get involved through FFF with lots of very new and exciting things. I started up the spread of #valuemaker on Twitter and developed an online finance community via my twitter handle @gcwFFF. I was the lead Value Maker on the Close Partnering (King's Fund) toolkit for clinical and financial engagement, which allowed me to develop some networks in provider trusts and learn more about them.

I started to think that I might actually be able to be brave enough to move out of Wigan CCG and into a new challenge, a new organisation.

## HELLO FROM THE OTHER SIDE...

Mersey Care was one of the pilots for the Close Partnering toolkit, so I'd developed a little bit of an understanding of their challenges through this and also worked on secure mental health in my first NHS role. So when an opportunity came up for a substantive post as Strategic Business Accountant for a clinical division, I took the leap. I started at Mersey Care in 2016 and it's been every bit as challenging and interesting as I'd hoped.

Becoming Finance Staff Development lead in 2017 was fantastic, and I've had the honour of working with our finance team to achieve Towards Excellence and FFF Level 3 Finance Staff Development Accreditation in 2018. I'm also being supported to do more FSD work outside of the trust and presenting at lots of HFMA events on our Four Strengths work and about our accreditation journey.

**What's next....? who knows....?**

### Favourite film

The Greatest Showman.

### Favourite book

The Girl Before, J.P. Delaney.

### Favourite TV series

The Handmaid's Tale, Dark Sun, Game of Thrones. I binge watched the first three series of GOT!

### Favourite food

Mexican or Spanish.

### Favourite pastime

Love crocheting and knitting – I find it so therapeutic. You can see some of my creations on my @gcwFFF account #creativeaccountant.

OUTSIDE  
OF WORK







Bill Gregory, Chief Finance Officer at Lancashire Care NHS Foundation Trust, describes his inevitable journey into finance, despite it not being his first career.

## JOURNEY TO DATE

When studying Mathematics and Management Science at the University of Hull in the early 1980s, Bill avoided the usual recruitment milk-round that the accountancy firms did by looking elsewhere and was drawn towards the IT sector. After applying for a variety of roles he was fortunate to receive a number of good job offers and decided to go with an IT software house that was based in London. Bill held this role for three years and says his main focus was to install front-office computer systems for businesses, which he found really interesting. He also enjoyed the travel that was a significant part of the role. However, it was at this point that two things happened to change his career direction. "My partner, who is now my wife, no longer liked living in London and wanted to move back up north; and I realised that the accountants I had met seemed to be the ones with the interesting and diverse jobs."

Bill started applying for management consultancy roles that used the IT skills and knowledge he had gained

but were more focused on finance – which he says was his main interest. He landed a job with Deloitte Haskins & Sells (DH&S) in Liverpool, who were one of the biggest accountancy firms in the country at the time. "I just struck lucky", says Bill. "The job was in the consultancy division and I worked for a partner who was a qualified accountant but had come through a 'non-standard' route." Bill was encouraged to study for his ACCA qualification whilst working in this role.

He says this was challenging as he was travelling a lot with work whilst studying and taking exams every six months. Bill says he found that ACCA worked well for him due to its flexibility, and he qualified in 1992.

During his time with DH&S, Bill worked with a variety of organisations, one of which was the North Western Regional Health Authority. Through this work Bill and the team at DH&S developed a business line of consultancy work with

the NHS. Bill says this was an interesting time to be engaging with the NHS as it was when providers were going through the process of becoming NHS Trusts, so there was a large amount of work around financial plans and assurance processes, which was the spark of interest that drew him towards the healthcare sector.

In 1992, Bill and his wife decided to have a family and it was clear that travelling around the country was

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"THIS WAS MY 'BAPTISM OF FIRE' AS A FINANCE DIRECTOR," AS AT THE TIME THE TRUST HAD A TURNOVER OF £10M. "I FELT LIKE I'D JUMPED INTO A FORMULA ONE RACING CAR AND PUT MY FOOT DOWN."

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no longer an option. This was when he landed his first ever role in the NHS as an Assistant Director of Finance at the NHS Management Executive Outpost in North Manchester. Most providers at the time were NHS Trusts and Bill was the 'link accountant' for a portfolio of trusts across the North West. This is similar to what regional teams now do at NHS Improvement. Bill worked with a variety of trusts that provided different types of care, including acute, community and mental health. Bill held this role for two years until he was given the opportunity to take on a secondment to his first Finance Director post at South Cumbria Community and Mental Health Trust. Bill says, "this was my 'baptism of fire' as a Finance Director," as at the time the Trust had a turnover of £10m. "I felt like I'd jumped into a Formula One racing car and put my foot down." Bill says it was a massive learning curve for him and really useful experience, however he was only there for 12 months as the Trust was going through a merger, so he started to look for other posts.

Bill then secured his first permanent Finance Director job at the Cardiothoracic Centre Liverpool NHS Trust, which is now Liverpool Heart and Chest Hospital NHS FT. Bill held this position for seven years, and to this day still thinks it was the best job he ever had. "At the time it was a small enough unit to really get to see everything and know everybody, but then you were dealing with all of the issues that everyone else in bigger Trusts was dealing with too. It was a really good job, but it got to the point of having been there for seven years, so I started looking for my next challenge."

He applied for some larger, more complex jobs but was not offered one. This frustrated Bill and was a turning point in his career, as he then left the NHS to work for private healthcare provider, Bupa Hospitals. Working in a Business Development role, Bill says he learnt a lot whilst he was there, "particularly around the commercial side of things, such as bids and tenders – all of which have been really helpful experience that

I use in my role today." Bill stayed at Bupa for two years but started to really miss the NHS – its values and what it's all about. "I also missed being leading my own finance team. I was only one of the team at Bupa and I started to miss the responsibilities and challenge that come with being an FD in the NHS". The NHS was where Bill really wanted to be, so he drew a line across the country as to where his family were prepared to live and decided to look for new opportunities.

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I ALSO MISSED BEING LEADING MY OWN FINANCE TEAM. I WAS ONLY ONE OF THE TEAM AT BUPA AND I STARTED TO MISS THE RESPONSIBILITIES AND CHALLENGE THAT COME WITH BEING AN FD IN THE NHS.

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Shortly after, Bill was offered the Finance Director role at Sherwood Forest Hospitals NHS Trust in 2004. Bill says it was an exciting time as they were going through the private financial initiative (PFI) and Foundation Trust (FT) application processes. "I found it interesting because Monitor (now NHS Improvement) were doing things very differently to what the NHS had done before, however in some ways their approach was quite familiar for me from having worked at Bupa." During his three years at Sherwood Forest, Bill and the senior team got their PFI deal signed off by the Treasury and gained FT status, which he says was a challenging and rewarding experience. Bill expresses that he very much enjoyed his time at the trust, and especially working for Jeff Worrall, "who was a great Chief Executive."

In 2007, Bill moved to Stockport NHS FT as Finance Director and says, "it is up there with Liverpool Heart & Chest as one of the best jobs I've ever had." Stockport was already an FT, but Bill had the opportunity to work on challenging projects around developing the site and managing IT and Estates. "It was a great time for me. My kids were at school, we lived nearby, so it was nice to have stability at home." Bill stayed at Stockport for seven years, which seems to be his benchmark for really enjoying a role and organisation. However, it was at this point that Bill started to look for his next challenge.

In 2015, the Chief Finance Officer role at Lancashire Care NHS FT became available. He was appointed to the role and is still at the Trust today. "I was attracted to the complexity of the organisation, and they also had a well-respected CEO in place, Heather Tierney-Moore." Lancashire Care is a whole-county mental health trust but provides community services across three regional footprints. Bill says that it is likely that the trust will also soon be providing MH services for South Cumbria, "so I've gone full circle back to where my NHS journey started."





## ON REFLECTION

Bill says that the most enjoyable aspect of his career in the NHS is the people with whom he has worked. "That's not just the finance teams; it's also the wider management team and the many talented clinicians I have engaged with. Anyone looking at working as an FD should know that getting on well, and enjoying working, with these people are the important factors."

Bill says that he finds it pleasing to see how professionalised the finance function in the NHS has become. "Finance in general has moved on immeasurably over the last 20 years, and it's fantastic to see the way that the NHS has kept pace with that and led the way in some respects."

## INVOLVEMENT WITH FUTURE-FOCUSED FINANCE

Bill currently sits on FFF's Finance Leadership Council (FLC) as the HFMA representative. He is also a HFMA trustee and will be their 2019 President. Bill has been involved in developing FFF's future strategy and one of the key things that he has been keen on implementing is connecting the FFF approach to people at the front line. "FFF isn't just about Finance Directors, it's about

developing professionals across the whole of the NHS, right through the bands and not just senior managers."

Lancashire Care are very active in FFF and Bills says that the Trust has used its Value Makers to help drive their achievement to receive Level 3 FFF Accreditation.

## REWARDS OF WORKING IN NHS FINANCE

Bill tells anyone looking to work within NHS Finance that, "you're going to get a job that is both interesting and satisfying. I have found my experience quite intellectually challenging which has really appealed to me. It also gives you the opportunity to go right up the 'pyramid of needs' in terms of what you want job-wise, opening lots of doors as you progress."

## LOOKING TO THE FUTURE

"The NHS is at an interesting point in its history", says Bill. "I think there will be some fascinating jobs and roles emerging, which will provide opportunities for organisations and individuals." He states that, "we're going to have to adapt to and evolve with the challenges we face, particularly to deal with the impact of an ageing population. If we embrace the need to change we will be able to ensure we get the right outcomes; for example truly integrated health systems. Otherwise change can be painful and will likely fall short of achieving what is really possible."



OUTSIDE  
OF WORK



### Favourite film

The Usual Suspects, a good lesson in the solution to your problems is usually staring you in the face.

### Favourite book

I like Ian Rankin's Rebus crime series; good bed time reading.

### Favourite television shows

The only thing I watch regularly is Match of the Day.

### Top three records

I listen to a lot of music especially when driving and try to go to a few concerts each year. Recently I have been to see James, Foo Fighters and Jimmy Eat World (care of my daughter having a spare ticket).

### Favourite food

Curry.



## CAREER STORY



### Edward John

Director of  
Operational Finance

**FRIMLEY HEALTH NHS  
FOUNDATION TRUST**



23456-35675-3783



## CAREER JOURNEY

Edward John is Director of Operational Finance at Frimley Health NHS FT. He started his finance career in the private sector with PwC in 1989 as a Trainee Accountant where he studied his ACA qualification – becoming a member of the Institute of Chartered Accountants in 1990. After qualifying, Edward decided that it was a good point in his career to take time out to travel the world and visit the friends he had made at the University of East Anglia, where he studied Economics and Film Studies. He travelled to Hong Kong, Mauritius and several countries across Europe for six months, which he said was an extremely enjoyable experience, “as I was able to see different places and learn about their cultures with locals.”

When he returned from his travels, Edward moved into the public sector to work for the Audit Commission, which he says he thought would just be a filler job whilst he thought about what he wanted to do long term. “An Audit Senior role came up which was just to cover annual leave for eight days, so I took this on and they ended up asking me to stay.” Not long after being taken on permanently, Edward was soon promoted to Senior Manager. It was during this time that Edward’s interest in the NHS developed. “I was doing both local government work and work for the NHS, and the NHS really struck a chord with me,” Edward says. “I really enjoyed the work that was involved and the buzz and feel you get from working in a hospital environment.” Five years into working at the Audit Commission, Edward says that he started to think about his next move. “My career kind of goes in five-year chunks. I get

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I REALLY ENJOYED THE  
WORK THAT WAS INVOLVED  
AND THE BUZZ AND FEEL  
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A HOSPITAL ENVIRONMENT.

”

itchy feet. I didn’t really realise this until I looked back at my CV one day and noticed that it was almost in exactly five-year blocks. I think I have this natural propensity to move on and do something different every few years to keep my interests alive and find new challenges. It just comes about naturally for me and happened to be at that stage in time when the opportunity for the Deputy FD position came up at Heatherwood & Wexham Park Hospitals.” Edward decided to apply for the Deputy Finance Director role after being asked to by the then Director of Finance, who was a client of his at the Audit Commission. Edward says that it was the first time in his career that he had the opportunity to go into operational mainstream finance and that his NHS finance career really took off from there.

After taking on the deputy role, Edward also held the Director of Finance position and worked at the trust for a total of five years. “All the roles have been brilliant experience because I’d gone from “game keeper” to “poacher” as I had started off in audit and then I moved into an operational role – so it was very interesting going from one side and then immediately changing to the other. Not many people make that switch or transfer.” Edward says that working at



Wexham was during an exciting time, “as we were a high-flying trust and it was during the time where NHS trusts were moving to FTs and this offered me great leadership and role progression experience.”

Edward then decided that he wanted to something different and went into interim and contract work for around eight years. There he was focusing on transformation and restructuring work, including on a number of mergers and acquisitions, and he worked in all sectors of the NHS. He started off in an acute trust and then during this period he also worked for a mental health and ambulance trust, as well as a health authority and CCG. In 2012 Edward moved back to Heatherwood & Wexham, then in 2014 following acquisition by Frimley Park Hospital to form Frimley Health, Edward moved into his current role as Director of Operational Finance, which he says, “was a really good move as I was able to be a part of the first FT-to-FT acquisition, taking on the challenge and responsibility of bringing two finance teams together.” Edward says this was invaluable experience and a real highlight of his career.

## BIGGEST INFLUENCES IN CAREER

Edward says that he has worked with a diverse range of people within the NHS finance function which has been fantastic but also extremely valuable for his career development. “I’ve been pretty lucky to get along with everyone that I’ve worked with. I’ve also been supported really well throughout my career. In particular, during the period that I was doing contract and interim work, I was involved with lots of different organisations and worked with a variety of different FDs and CEOs. This was great because each one was different and had their particular strengths and weaknesses, and I was pulling from all that resource and experience and the different characteristics that each one had. From working with such a diverse range of leaders, I have gained a richer development experience.”

OUTSIDE  
OF WORK

### Favourite film

Castaway.

### Favourite book

To Kill a Mockingbird.

### Favourite TV series

Amazing Spaces.

### Top three records

Anything by Marvin Gaye,  
Prince or George Michael.

### Favourite food

Indian.



## WHAT NEXT?

Edward has been in his current role for five years, however he seems to be breaking his “itchy feet” routine. He says that he is really happy where he is and enjoys his current role because it is constantly changing, and he is involved in some big, exciting projects – like the build of a brand-new hospital at the Heatherwood site. However, Edward is always looking for new challenges and to do something different within the role. He particularly enjoys being involved in the work that comes with any big changes in the NHS, such as within the newly formed Integrated Health Systems. “I’m always looking to broaden and expand the role to keep it interesting and develop myself further, and there are always opportunities to do so within the NHS.”

## INVOLVEMENT WITH FUTURE-FOCUSED FINANCE

Edward is very supportive of projects for Future-Focused Finance (FFF) and is currently Programme Lead for the Diversity workstream. Edward says that he wanted to be a part of something bigger and broader than just mainstream finance, “and being involved in FFF and the diversity workstream offered me exactly that. FFF does some great work in developing both the individual, the finance function and its reputation, as a progressive and integral part of the NHS. Diversity in particular is a massively important issue for everyone and not just within the NHS, and being of BAME origin, I am delighted to be part of the positive change we are trying to create.”

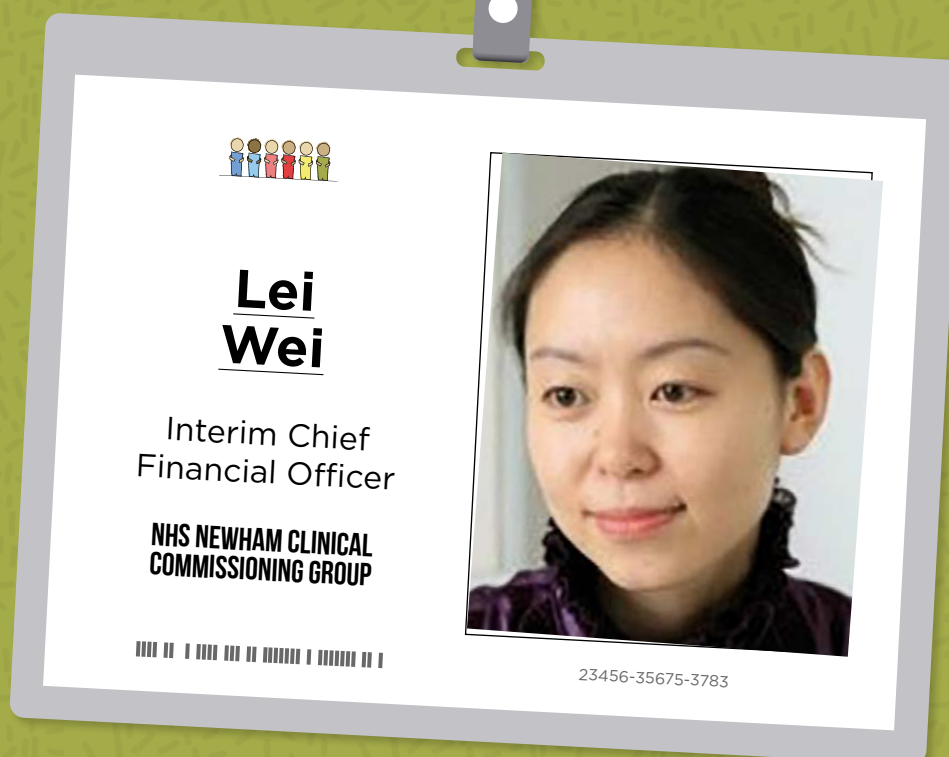
## WORKING IN NHS FINANCE

Edward describes working in NHS finance as “the perfect place to be” for anyone that wants to work in an NHS environment but doesn’t particularly want to be on the front line. “If you don’t want to be a clinician but enjoy working with numbers and being a part of a support team, then accountancy in the NHS is the best of both worlds. For me it is really cool to be walking around a hospital every day, and being a part of an environment that is delivering health care, as you’re a part of that, even if indirectly.”

Edward says that working in NHS finance enables you to take on lots of interesting challenges and roles and that there is more than one route into the senior positions. “You can start wherever you like and move across. I started elsewhere, moved in and back out again, and so on. There are so many opportunities that you can be involved in and it’s very different to anywhere else as you don’t have to follow one specific route to get to where you want to be.”



## CAREER STORY



### CAREER JOURNEY TO DATE

Lei Wei started her journey into the NHS 17 years ago back in her home country, China, as a medical student. After completing her training – something she thoroughly enjoyed – she decided to pursue a master's degree at Imperial College London, studying a programme combining medicine and management, and she moved to the UK in 2006.

On completion of her master's degree, Lei joined PwC in their London-based Public Sector team, focusing on the health sector, local authorities and central government. She became ACA qualified in 2011. "I really enjoyed working for PwC and was given excellent training in developing both technical knowledge and soft skills." Lei says her time at PwC was invaluable, as they trained her to be able to go into any complex system and pick things up quickly – something that was hugely beneficial for her career in the NHS.

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ONE THING THAT HAS ALWAYS MOTIVATED ME IS TO MAKE A DIFFERENCE TO PEOPLE'S LIVES. I KNEW THAT BY WORKING FOR THE NHS, HOWEVER SMALL A JOB AND NO MATTER HOW FAR AWAY FROM THE FRONT LINE, I WOULD BE ABLE TO CONTRIBUTE TO THE PUBLIC.

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### WHY THE NHS?

Working in the public sector was always an interest of Lei's: "One thing that has always motivated me is to make a difference to people's lives," she says. "I knew that by working for the NHS, however small a job and no matter how far away from the front line, I would be able to contribute to the public."

Lei landed her first NHS role in 2015 at NHS Newham CCG as Deputy Chief Finance Officer. "It was a fantastic way to begin my NHS journey as it allowed me to quickly get a good understanding across a wide range of health services in the NHS." When Sustainability and Transformation Partnerships (STPs) were formed in 2016, Lei had the opportunity to get involved in the system financial strategy development as one of the finance leads, working with a diverse range of organisations and stakeholders in North East London. In 2017 she stepped up as Interim Chief Finance Officer at the CCG following the retirement of her predecessor.

### CURRENT ROLE

As Interim CFO at Newham CCG, Lei's current responsibilities include: advising the Board on all aspects of financial strategy and financial management; playing an active role in determination and implementation of the CCG and STP strategy; and, driving transformational changes through the promotion of financial leadership at all levels. She is also involved in partnership working, both within the STP footprint and London-wide, to enable patients to live healthier and longer lives.

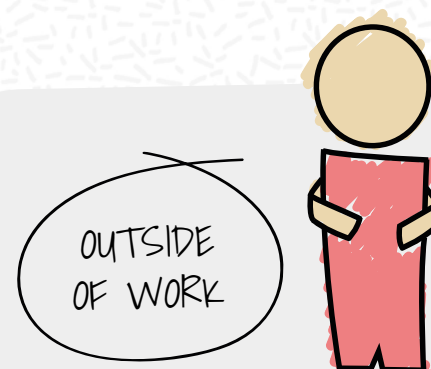


“We have developed really good relationships and brought together over 20 organisations in the North East London health economy to pursue the same goal: to bring the best possible health and social care outcomes for the local population.” Lei says, “Managing the complex relationships between stakeholders and across the system, while ensuring a good balance between corporate and system-wide decision making, are key to ensuring that the required outcomes are achieved, at the best possible value.” She thinks that these are the most challenging and enjoyable aspects of her current role.

## DEVELOPMENT OPPORTUNITIES

With an obvious thirst for knowledge and learning, Lei has undertaken several development opportunities, including completing PRINCE2 qualification, the Top Manager Programme at The King’s Fund, and joining the Future-Focused Finance (FFF) Aspiring Finance Leaders National Talent Pool. She has been building professional networks to meet and learn from peers and experienced finance leaders in the system.

As part of the London FSD Board and FFF Diversity Delivery Group, Lei put herself forward to be a role model for female and BAME finance leaders, aspiring to act as an exemplar and an encouragement to others whose engagement will strengthen the diversity of the NHS finance function. “Diversity in NHS finance has improved, however there’s still a long way to go and I want to be one of the key campaigners promoting this exciting movement.”



Lei is a big fan of Science Fiction and had her own book published in China whilst she was at medical school. Outside work Lei likes to keep active by doing yoga and Tai chi regularly. She is also a trustee of a charity with a history of over 130 years in supporting the elderly and children in poverty.

### **Favourite book**

The Three-Body Problem by Liu Cixin.

### **Favourite food**

Chinese dumplings.

### **Alternative career choice**

Medical Doctor.

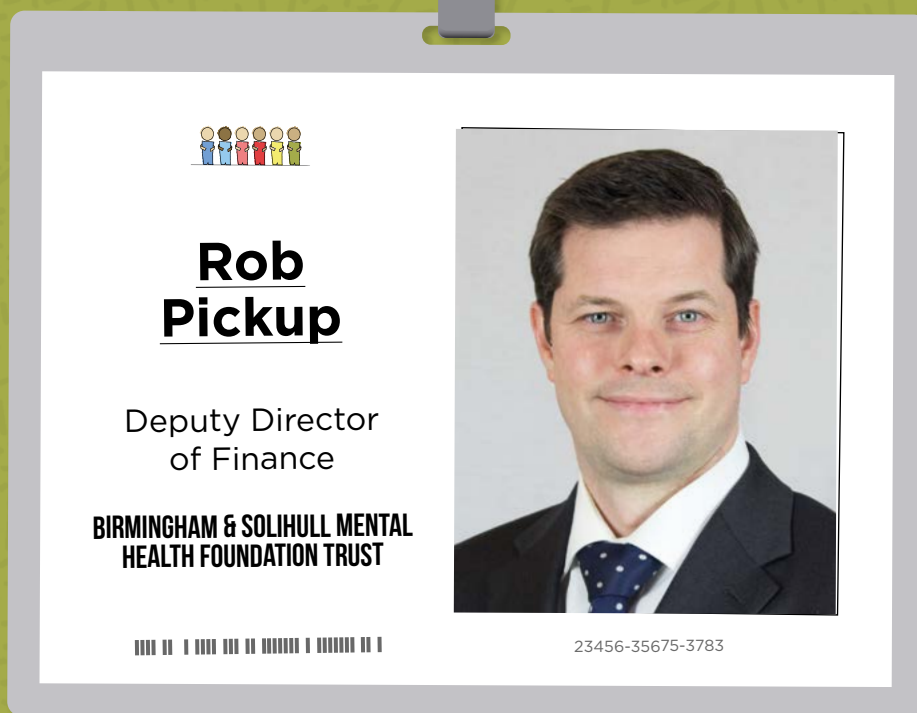
## HIGHLIGHTS AND LOWLIGHTS

Lei expresses that she has had many highlights since joining the NHS. One particular programme of which she is most proud is her role as commissioning finance lead driving structured collaboration for the local musculoskeletal (MSK) services. “We brought our local acute trusts, community services, primary care and third sector providers together, and after 3 years’ hard work, successfully developed an end-to-end pathway to deliver MSK services. The pathway created timely and high-quality service access and maximised patient benefits. It is such a good demonstration of system-wide collaboration and innovation that it sets a strong footing for the CCG and North East London for future development as an Integrated Care System.”



## ADVICE TO ANYONE CONSIDERING A CAREER IN NHS FINANCE

Lei recommends a career in NHS Finance very highly. “It is such a rewarding career path where you can truly make your contribution to the society. There are lots of opportunities for your personal development too. I enjoyed working in the private sector, but it can never compete with what I am now doing in the NHS.”



Rob's career journey started with a love of Monopoly. Although he didn't know it yet, it was this that would lead him to choose a degree in finance and accountancy and the beginning of his NHS career. Despite the vocational nature of his university degree, Rob was not clear about what the future would hold in terms of his career path. After taking a gap year to travel, he took on a temporary job working for Npower, leading to his decision to want to work in the public sector. This was primarily down to the desire to help people, rather than simply improve the bottom line of the company, which is what he had been concentrating on whilst at Npower. On the back of this decision, Rob applied to, and was accepted onto, the National Graduate Financial Management Training Scheme (GFMTS).

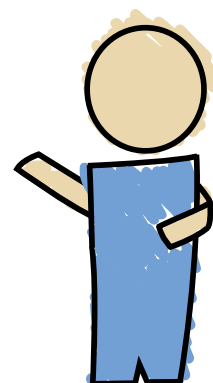
“SEEING HOW KEEN PEOPLE WERE TO HELP AND GET HIM INVOLVED, ROB OFFERED TO TAKE THE MINUTES FOR THE SAVINGS GROUP, WHICH WAS RESPONSIBLE FOR CREATING £25M WORTH OF SAVINGS AT HIS TRUST.”

Rob considers being on the GFMTS as his first lucky break. The scheme offers many opportunities to its participants, including qualifications, placements and additional opportunities. Whilst on the scheme Rob became CIMA qualified; however, it was also where

his drive for working in the NHS was fuelled. “The Chief Executive of one placement that I worked in grabbed me and gave me no option about going to a clinical executive meeting,” Rob says. From that point onwards, he continued to attend these meetings and observe the progress being made. Seeing how keen people were to help and get him involved, Rob offered to take the minutes for the savings group, which was responsible for creating £25m worth of savings at his trust. This also helped him to see the progress of actions taken by the group.

After graduating from the scheme, Rob went on to be a Shared Services Accountant for a year at the trust where his final placement had been. He then took on the role of Senior Commissioning Accountant, where he was responsible for chairing performance meetings and reported directly to the Director of Finance and Commissioning. Throughout his career Rob has recognised that having a variety of experiences and exposures is important. Having spent time in Primary Care Trusts (PCTs), Rob decided to move back into the acute sector. It was at this point that he pursued and obtained a Finance Manager role at Birmingham Children's Hospital.

After Birmingham Children's Hospital, Rob took a secondment as Assistant Director of Finance at Worcester Acute Hospital to cover a maternity post. The role was then made permanent. It was during





this time that he had the opportunity to lead on a project that brought radiotherapy services closer to the hospital. Before this patients had to travel over 60 miles a day to a different county in order to receive radiotherapy services. The project managed a reduction of three million miles for the patients involved. Rob took a lead finance role in this project, which he says was one of the highlights of his career.

Rob then took on another secondment, which placed him into his current role as Deputy Director of Finance at Birmingham and Solihull Mental Health Trust. Most of his time in this role is spent on ensuring the financial stability of the organisation through working with both finance and operational teams. A significant amount of time is also spent on reporting and ensuring that this is accurate. With the organisation being involved

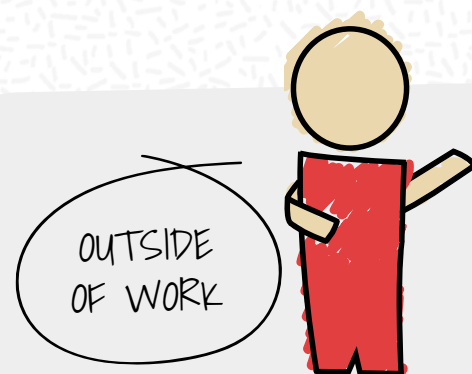
“THE PROJECT MANAGED A REDUCTION OF THREE MILLION MILES FOR THE PATIENTS INVOLVED. ROB TOOK A LEAD FINANCE ROLE IN THIS PROJECT, WHICH HE SAYS WAS ONE OF THE HIGHLIGHTS OF HIS CAREER.”

in a lot of new developments, including two of the vanguards, Rob is the finance lead for two of these developments. One is a new model of care, moving forensic mental health patients closer to home. This has been one of the biggest challenges for Rob because, “no one has done it before, so you can’t ask people how to solve the issues you are struggling with. You have to work at it as you go.” Building good relationships and networks is something that Rob has always valued throughout his career and has found easy since he communicates well, or as he would say he, “talks a lot.”

HFMA has played a significant part in Rob’s additional career development. This started when he was a trainee, being a member of the HFMA committee as a student representative. He then continued this and is still a member of his local committee now, having held the positions of Branch Secretary and Treasurer. This has been another highlight of his career as he was nominated and then awarded a Key Outstanding Contribution Award in 2011. External organisations such as FFF and FSD have also played a huge part in creating networks and opportunities for Rob. This includes his involvement with the FFF Great Place to Work action area. Rob aspires to become a Director of Finance and, as such, he is currently part of the Future-Focused Finance National Talent Pool.

Mentoring has also been helpful to Rob’s development throughout his career. So far, he has had three mentors whom he sought out in person. He recalls the memory of asking one mentor as she was walking off the stage having presented at a conference. A key thing when

looking for a mentor is thinking about someone who has a certain skill-set; but more importantly, it has to be someone that you trust and who can bring out the best in you. Rob says that a benefit of mentoring “is creating the space and time for you to talk and reflect through your own thoughts that you don’t have time to do in your ordinary day. It allows you to talk through problems with someone who has a different perspective to you and is especially helpful when considering new roles or future career path.” One thing that he thinks of every time he gets a new job is to, “think through what I would want to achieve in the role in the first week, month and three months. What your manager would want you to achieve, what the organisation would want you to achieve and try to match these whilst still meeting targets.”



Outside of work, Rob has two very young children and he spends a lot of time with them, taking part in rugby, or swimming. He has always felt that work should be left at work so that he can maintain a good work-life balance.

#### **Favourite film**

The Sting.

#### **Favourite book**

The Fortunate Pilgrim.

#### **Favourite TV series**

The West Wing.

#### **Favourite food**

Chinese.

#### **Favourite website**

NFL.



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