

## **Clare Shelley, Deputy Director of Finance, Business & Value Cheshire & Wirral Partnership NHS Foundation Trust**

June 24th 2024

### **Background**

Clare is currently the Deputy Director of Finance, Business & Value at Cheshire & Wirral Partnership NHS Foundation Trust (CWP) and is responsible for Finance, Procurement, Contracts and Business Intelligence functions.

Clare has worked within the NHS for almost 20 years with a range of experience across Mental Health, Community, Specialist Acute providers as well as working within a range of Commissioning organisations all within the Cheshire & Merseyside footprint.

Clare is a qualified member of the Chartered Institute of Public Finance & Accountancy as well as a qualified member of the Association of Accounting Technicians and also has a BA Hons in Business from the University of Chester.

Clare is an advocate for Finance Staff Development and after being a Finance Staff Development lead for a range of organisations for over 8 years, successfully leading on level 2 & 3 Towards Excellence Accreditations, Clare is a member of the Towards Excellence Finance Assurance Group and is an assessor for organisations undertaking their own assessment.

Clare is a sponsor on the One NHS Finance Sponsorship Programme and is also a mentor. Clare also has a mentor herself. In 2010 Clare won the HFMA North West Branch Sue Rosson Award and was shortlisted for the HFMA Outstanding Individual Award in 2023.

### **Career Path**

Clare started her NHS Finance career in January 2005 as a band 3 within CWP, where she began to study for her AAT qualification. Clare progressed through a range of roles from Management Accounts to Income & Contracting. In 2009 Clare joined Sefton Primary Care Trust as a Management Accountant and had her first experience of organisational change within the NHS where Community Services were disbursed & transferred to neighbouring Community Trusts. Clare made the decision to remain within the commissioning function and support the establishment of South Sefton & Southport & Formby Clinical Care Groups as a GP Consortia Accounting and then progressed to the Head of Financial Planning and Reporting.

In 2014 Clare took a move to Wirral Clinical Commissioning Group which was closer to home after a period of maternity leave. She became a Senior Contracts Accountant in which she led on a range of non acute contracts including Community, Mental Health and Specialist. After a second period of maternity leave, Clare had the opportunity to act up again within Financial Management. This was then followed by an opportunity for a Head of Financial Management. Whilst this was a more technical role within Financial Accounts, Clare made the brave step to try something new. Clare was successful in her application for this role which was particularly challenging as the pandemic sent us into lockdown, however was a great learning experience and she really benefitted from Financial Services networks across Cheshire & Merseyside.

Clare stayed in this post for approximately 2 years before being successful in a further acting up arrangement to cover a 6 month secondment as the Deputy Chief Finance Officer.

In 2021 pending the formation of Cheshire & Merseyside Integrated Care Board, Clare was successful in her application to join Alder Hey Childrens NHS Foundation Trust as an Associate Finance Director of Operational Finance which provided experience within a specialist Acute Trust.

In 2024, 19 years after first joining CWP, Clare was successful in her application for the Deputy Director of Finance, Business & Value back where it all began. This offered a different dynamic in that this role is responsible for Finance, Contracts, Procurement and Business Intelligence and has a team of over 70 staff.

***What first attracted you to a career in NHS finance? Did you pick accountancy or the NHS first?***

*After a short period working within an accountancy practice and industry after university, I knew I wanted to embark upon a career in the NHS. I had friends and family who worked there and had so much variety, development and really enjoyed their careers. I had chosen finance before the NHS but I needed variety in a role and I wanted to work for a big organisation that invested in its staff and offered opportunities.*

***What did you expect and were your expectations confirmed?***

*I didn't really know what to expect, I was that focussed on getting a role within the NHS and the rest is history. I think one of the best things that I came across that hadn't cross my mind is the network of excellent colleagues across Cheshire & Merseyside who feel like an extended team of my own. I have been very fortunate to have previous line managers, colleagues and mentors who are always on hand for support. I think this is one of the best things about working for the NHS.*

### **What are the highlights and lowlights of your career so far?**

*I was the Finance Staff Development lead for around 8 years and led a number of organisations through their level 2 & 3 Towards Excellence Accreditations. Highlights of my career have been embracing when a team is thriving and ensuring there is recognition for their hard work. I have also been very fortunate to have been nominated for awards and to read the testimonials are priceless to appreciate the impact you have had on others. I work within a fabulous team where there is a real drive for continuous improvement and the team have had some great successes this year so far.*

*In terms of lowlights, I found the Primary Care Trust disbursement difficult for a variety of reasons. The team that once was, were moving into new roles in either the new Clinical Commissioning Groups, Commissioning Support Unit or transferring into the Community Trust. We also had to go through a due diligence process and part year accounts. This was a tough time but still lots of things that I learned.*

### **Personal Development**

#### **How have you continued your professional development? Any tips for others?**

*I have remained proactive with my CPD as this is an area of my role that I really enjoy and there is so much resource out there to benefit from. This keeps me up to date with technical knowledge and keeping up with the pace of change. CPD also helps me focus on continuous improvement in my own leadership but also bringing good practice into my work place. Top tips would be to create a folder in your emails or network to keep a log as you go along because it is difficult to remember what you've done 12 months further down the line.*

*I also keep a "positive folder" which is something I have found hugely beneficial to reflect back on if I am having a particularly challenging day. A positive folder will consist of thank you's, positive feedback and recognition. I would strongly encourage this to keep us going in the challenging environment we operate in.*