

# Finance Consultation Document

Draft 0.2

**30 March 2023**

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## SECTION 1: Executive Summary & Foreword



**Rosalie Percival**  
Chief Financial Officer

In the many years I have spent working in the New Zealand health system, I have seen countless instances of extraordinary and exemplary work. However, there have also been some longstanding concerns: inequitable outcomes for Māori and other population groups; inconsistent performance in regional and national planning; issues with how we develop co-ordinated approaches to clinical service delivery; persistent questions regarding financial sustainability; and a variety of other concerns. To address these gaps, Te Whatu Ora came into existence on 1 July 2022.

Since then, we have been working to deliver services that are nationally planned and co-ordinated for consistency, regionally empowered to implement and integrate and enable locally tailored delivery of care. We have also started to reorganise ourselves so we are best positioned to deliver on the objectives of the Pae Ora Act 2022, the Act that established Te Whatu Ora. A key step was the Unify to Simplify consultation, which resulted in a change in the reporting lines of district Chief Financial Officers into the national finance function. The next step will be to implement a national finance function that is coherent, efficient and supports the evolving structure of Te Whatu Ora. We have been calling this work the development of the 'finance operating model'.

Our work on the operating model began with a workshop with about 75 senior finance leaders from across the motu on 28 September 2022, with a follow up meeting of that group on 4 November. In addition, in October 2022 I presented my views on the objectives of the finance function to two hundred staff at the Health Sector Finance Workshop held in Hamilton.

There have been significant efforts to align our operating model with other enabling functions, such as Infrastructure, People and Culture, and Data and Digital. In addition, we are also working to align with the structures being developed in the Hospital and Specialist Service, Commissioning and other business units. The result of that work is this proposal, though it will not be completed until we have your comments and suggestions about how to best achieve our objectives.

Change is hard, and there has been a lot of it in the last few months. Nevertheless, I have been heartened by the resourcefulness and resilience shown by my finance colleagues right across Te Whatu Ora. I am motivated by one of the key principles we have discussed with senior finance leaders from the beginning, which is that we aim to manage the change process in a way which enhances the mana of all of us, including affected individuals.

I am proud of the culture we have fostered together within the Finance Business Unit, and the respect and warmth I have seen amongst my colleagues is particularly rewarding. These robust foundations will set how the Finance functions at Te Whatu Ora treats others, is perceived by others, and how we treasure ourselves and our colleagues.

We have endeavoured to listen to a range of voices in developing this proposal, but your comments and suggestions are essential to ensure we get it right. This consultation will be open until 28<sup>th</sup> April 2023, and I hope you will take the opportunity to share with me your thoughts, reflections and suggestions.

These proposals may be troubling to some, and I encourage all of you to consider further discussion with your manager or EAP, if you feel that would be beneficial.

Ngā mihi

Rosalie Percival

## SECTION 2: Our Proposal

### Simplify to Unify

Our next phase of change aims to **achieve nationally planned and co-ordinated consistency, to empower regional implementation and integration, and to enable locally tailored delivery of care**. We are working towards flat structures over time, with minimal layers. In this next phase we aim to:



#### Achieve nationally planned and co-ordinated consistency

by reducing duplication, establishing centres of expertise and co-ordinating national networks to enable consistency.



#### Empower regional implementation and integration

through Regional Integration Teams and Networks to enable service planning at a regional level and contribute towards equitable access and coverage.



#### Enable locally tailored delivery of care

through Localities establishment, hospital networks and partnerships with local communities.

The changes we are proposing across our enabling and delivery teams aim to achieve:

**Enabling services:** Reduced duplication through nationally co-ordinated and regionally integrated business support, streamline to reduce frontline time spent on non-clinical activity.

**Delivery services:** Clear accountability for delivery of patient facing care, organised to identify and reduce inequity of access across regions and population groups, networked to support clinical leadership and patient/whānau voice in decision making.

The health system reforms present a unique opportunity, and need, to change our Finance capabilities, functions, tools, and ways of working. This reform is needed to support healthcare to be more accessible, sustainable, equitable, and resilient. To do this, we need to understand both where we are starting from, and where we want to go at national, regional, and local levels. To progress this work, this consultation reflects the next step on this journey.

In my earlier comments, I recounted the process that we have used to get to this point. Early in that process, we developed the following objectives for the Te Whatu Ora Finance Business Unit:



Be far *more consistent* across the nation, with *reduced duplication and fragmentation*



Be *better connected* to other services and functions



Improve *innovation, sharing and consistent adoption* of best practice



Key finance functions will be *nationalised / centralised* (noting this doesn't **necessarily indicate co-location**)



Operate utilising a *Business Partnering model* which is responsive to the requirements of the delivery system and focused on the needs of customers



Business partners will be functional not generalist and *drive improved value and continuous improvement*

## SECTION 2: Our Proposal

The first change in finance (and the other Enabling Business Units) occurred following the Unify to Simplify consultation in which the principal outcome for us was the realignment of the district Chief Financial Officer (CFO), or equivalent, reporting lines into the Te Whatu Ora National Office. This change reflected the organisational view that finance (and the other Enabling Business Units) should have its staff reporting into the national function and provide support to the rest of the organisation by matching up our finance staff into line managers on an advisory basis.

Finance staff know that their relationship to line managers is complex: our role is to bring expertise to the Delivery functions to assist in management and planning. But line managers are more than customers; finance staff also have a responsibility to Te Whatu Ora to ensure that operating decisions are taken consistent with fiscal prudence and discipline. This kaitiaki role of Te Whatu Ora assets and operations is an important balance to the support we provide, and the structure of the Finance Business Units reporting into the Te Whatu Ora CFO is intended to encourage both a support relationship to the organisation as well as exercising our independent responsibility to ensure sound fiscal decision making.

Before describing the proposed future state, it is worthwhile clarifying leadership levels within the organisation and appropriate terminology.

Term	Definition
Tier 1	Chief Executive of Te Whatu Ora
Tier 2	Direct reports to Chief Executive – National Directors/Chiefs
Tier 3	Direct reports to Executives – Regional Directors and functional Directors
Tier 4	Direct reports to regional Directors and functional Directors – Group Managers
Tier 5	Direct reports to Group Managers

Please note these are not related to financial delegation levels.

### Structure and People

The proposed organisational structure that follows builds on the nine (Tier 3) Director positions that have been created that will report directly to the CFO and which we are actively recruiting into. At a high level, the functions that relate to these roles are:

**Office of the CFO:** This function serves as direct support to the CFO, particularly in managing external expectations, including the Board, Ministry of Health, Treasury, and the Minister, as well as a range of external stakeholders

**Business Partnering (3):** Business partners will liaise directly with their Business Unit(s) at the appropriate levels to assist with a range of familiar functions: working with managers to develop their budgets, assisting in monitoring actual performance against budget, adding financial modelling and planning expertise to a range of organisational change initiatives from operational analysis and improvement to new initiative business cases. The focus of the three groups is detailed below:

- Hospital and Specialist Services: whilst this business unit requires assistance across all domains, efficiency and operational effectiveness are the key areas of focus.
- Commissioning: like all the business units, all of the domains are required, though change is a key area of focus for this business partnering group.
- National Services, which includes Infrastructure and Investment, Data and Digital, National Public Health, and a range of other smaller functions. These Business Units have a disproportionate focus on long-term strategic concerns.

**Reporting, Costing, and Standards:** This function sets the national expectations, format of work done in finance across the organisation, and quality assurance in business partnering. Key activities include developing national budget assumptions, the format of monthly financial reports for the business to support a consistent approach to budget/actual analysis, the approach and assumptions for business cases, our approach to costing, and a range of other national standards and approaches.

**Performance Improvement and Benefits Realisation:** This small team will focus on identifying performance issues, assist in improving operations where possible and intervene when required.

**Financial Services:** The financial services function will combine the transaction and enterprise accounting functions across the organisation. This function will work according to the principles above, especially *nationalised / centralised but not necessarily co-located*. Working out how to be national but not co-located to enhance effectiveness and efficiency will be a key area of focus. In addition, this function will also contain the activities associated with enterprise accounting, especially managing the balance sheet for Te Whatu Ora as a whole, as well as managing the audit relationship and related compliance matters.

**Sector Operations and FPIM Implementation:** These functions are expected to be largely unchanged whilst the Health Sector Agreements and Payments (HSAAP) and Finance, Procurement and Information Management (FPIM) programmes are underway.

What is now being proposed is the structure and leadership (Tier 4) roles that will sit within each of these nine functions. A draft structure chart is provided on page 7 with more detailed information on the proposed new roles available in Appendix 1.

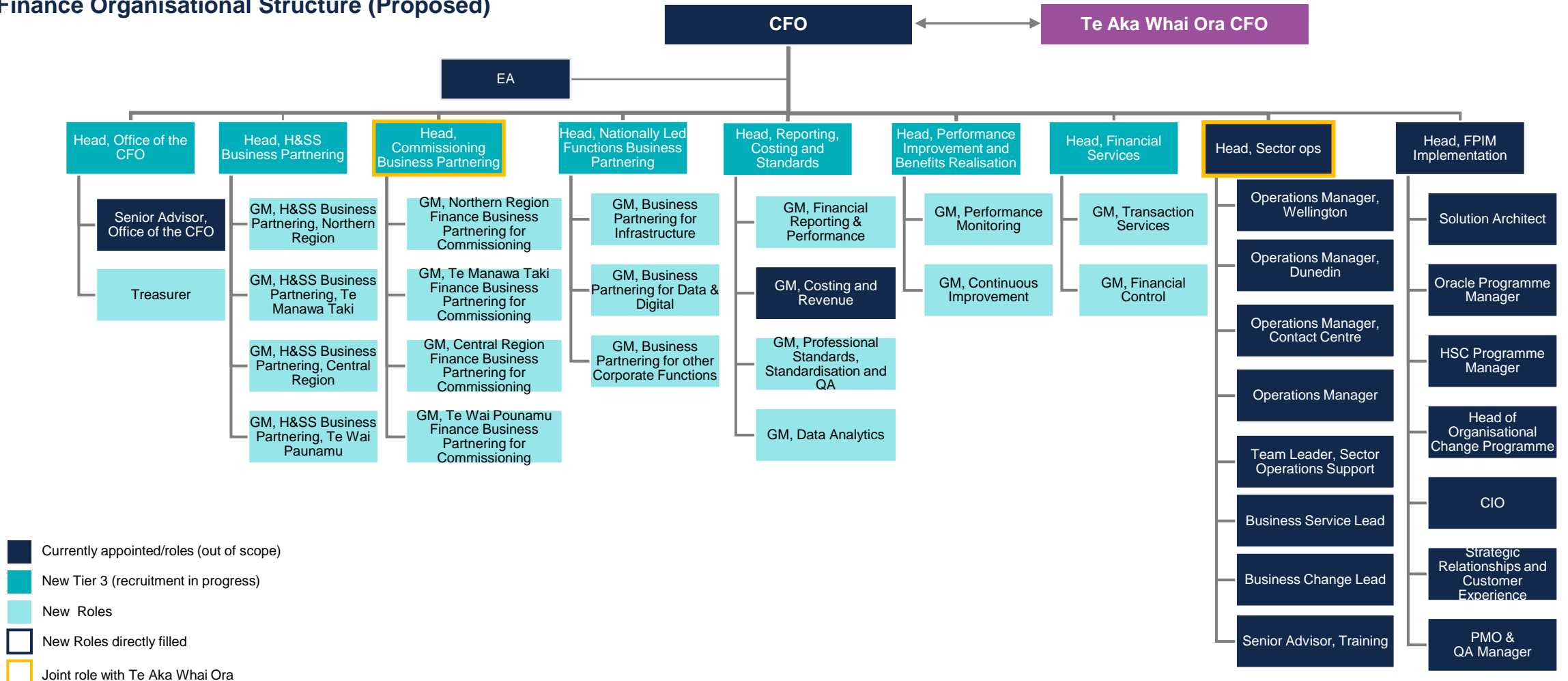
## Process and Tools

The finance team across Te Whatu Ora will migrate onto common tools, processes and functions. As described above, the Directors of Reporting, Costing and Standards as well as Financial Services will take a leadership role in this respect. A second key pillar of this standardisation will come from the adoption of FPIM as the system-wide financial management system. Whilst other functions will interact with FPIM and the Procurement and Supply Chain team will manage the Health Sector Catalogue that is a part of FPIM, this proposal contemplates overall management of FPIM will rest within Finance, and will migrate into the financial operations function over time as the FPIM Implementation project migrates into business-as-usual over time.

Those functions will include:

- Managing the development roadmap for FPIM (e.g. migrating to a common budgeting application);
- Master data for the FPIM system overall, including maintaining the Te Whatu Ora chart of accounts and Responsibility Centre (RC) structure, with master data for some data elements delegated to specific teams (e.g. supplier master data management delegated to Procurement and Supply Chain staff);
- System administration, including maintenance of users that will load and approve expenditure (requisitions and invoices); managing version updates and upgrades; managing user permissions for financial data; establishing and managing financial delegations and escalation pathways; and other similar activities; and
- Training functions for staff that raise requisitions, approve expenditure, access budget and actual financial information for differing levels of the organisation, etc.

## Finance Organisational Structure (Proposed)



## SECTION 3: New positions

To support this proposal, consideration has been given to the responsibilities for proposed new positions.

Outline position descriptors for the proposed new positions have been developed and can be found at Appendix 1 of this document. These are not fully formed position descriptions; they are intended to serve as a role descriptor of leadership responsibilities and position scope.

Post consultation and consideration of feedback, full position descriptions will be prepared and sized for remuneration purposes prior to being confirmed in any final decision document.

These new positions are opportunities for individuals who are significantly affected by the proposals and we welcome any feedback on what is being proposed. Our key intention is to retain the skills, expertise and knowledge from across the organisation.



## SECTION 4: Impact of Proposal – existing positions

In creating the new roles detailed in Appendix 1, we are proposing to disestablish a number of positions from within the existing districts and ex shared services teams. A list of these positions is provided in Appendix 2. We would like to reinforce that these are proposals and that no final decisions have been made. We will continue to work with each significantly affected individual to ensure that they have the necessary support during the change process.

A list of roles for those whose reporting line would remain within the Finance Business Unit, but would change, can be found in Appendix 2.

It is also evident that there are a wide range of individual roles and whole teams that currently sit within and report to the leaders of our existing district and ex shared services Finance teams that are better aligned to other Business Units within Te Whatu Ora. Each of these Business Units will be going through their own change proposals and it is recommended that those individuals and teams take the opportunity to read the change proposals for those Business Units when they become available. Whilst it has been challenging to establish a definitive list of the individual roles and teams that this relates to, a list is provided in Appendix 2.

Given the nature of this change and the bringing together of all the districts and ex-shared service agencies into Te Whatu Ora, there will be a potential impact to a number of current positions. Given the complexity of the systems, how positions are grouped together in districts and the quality of the data across the multiple payroll systems, it has been challenging to identify all of the roles and the impact on them. There may be inaccuracies in terms of position titles, people being missed etc. We apologise in advance for any inaccuracies in the data and ask that if you identify inaccuracies that you raise them as soon as possible through the consultation process.

The following definitions are used in Appendix 2 to describe the different scale of impacts:

Impact	Explanation
<b>No impact</b>	The position would remain unchanged.
<b>Impacted</b>	<p>A position would be impacted where there would be some changes to the current position if the proposal was confirmed. However, the changes would not be significant, and the position would remain substantially the same. The terms and conditions of employment would be no less favourable and the salary for the position would be the same.</p> <p>Examples of these types of changes could include a change in position title, reporting lines or mapping to new positions. Individuals in these impacted positions would be reconfirmed into the position, with any relevant changes.</p>
<b>Significantly Affected - disestablished</b>	A position would be significantly affected where the current position would incur significant change to its scope, location, terms and conditions or will not exist in the new structure. A position would also be significantly affected if it is proposed that there would be fewer of the same or substantially the same positions in the proposed new structure.

When reviewing and undertaking an impact assessment we have considered the level of change to existing roles, their scope, function and deliverables, complexity, number of direct reports, budget etc.

## SECTION 5: Proposed disestablishment, recruitment and selection processes

The proposals contained in this document include potential disestablishment of a number of positions, and the creation of new roles. This section outlines our proposed approach to career transition support, the disestablishment process, recruitment and selection into new roles and other related matters.

### Career Transition Service

Career advisory support will be available from the beginning of the consultation process to all employees whose roles are proposed to be disestablished. Although no final decisions have been made about the disestablishment of any positions, we want to ensure that those who are significantly affected by these proposals have as much time as possible to consider all of their options and seek support.

The Career Transition team will:

- Provide support and advice to significantly affected employees;
- Link employees to external support including career coaches, training, and other external support such as CV writing, interview skills support, etc; and
- Link employees to well-being supports including EAP.

### Disestablishment process

Once we reach the final decision stage, new structures will be confirmed. We will follow the below process with those employees whose roles are confirmed to be disestablished:

- Employees will be given 1 month's notice of the intention to disestablish the position, followed by their contractual notice period;
- Pay in lieu of notice may be given on a case-by-case basis; and
- Employees who are made redundant are able to return to Te Whatu Ora in the future.

### Retraining

- Reasonable support will be provided to employees whose roles are disestablished and who wish to retrain; and
- If employees wish to retrain into clinical frontline roles, we will consider increased training support. If you would like to consider this, please contact the Career Transition Support Centre.

## Recruitment and selection processes

Once we reach the final decision stage, final structures will also be confirmed along with any new roles. The process we propose for recruitment and selection into these roles is:

- Position descriptions will be available at final decision stage and will be sized to determine their salary level. Prior to this, during consultation stage, brief descriptors will be available which give a high-level view of the role and responsibilities;
- Employees whose position is disestablished will be considered for new roles in the new structures in the first instance with recruitment and selection processes to be undertaken within the first four to six weeks after the final decision document is issued;
- During this period, we will run an expression of interest process for new roles for employees whose roles have been disestablished;
- Disestablished employees will be able to apply for any suitable roles and will undergo only 1 interview where possible - we will endeavour to ensure that all relevant hiring managers are present for this interview, and that it is structured to ensure that both the interviewee and interviewer are able to make a comprehensive assessment of suitability for the role(s);
- During the consultation process, the recruitment team will also make an assessment of other current vacancies and consider whether any of those should be 'paused' to allow for employees whose roles have been disestablished to be considered for them. This assessment will be made on the basis of similarity of the vacancy to disestablished roles. Where there is a business critical need for the position to be filled immediately, and the vacancy may be suitable for employees whose roles have been disestablished, interim appointments will be made to the position;

- Following the above EOI process, any roles which have not been filled will be advertised through our normal channels. At this stage, other internal candidates will also be able to apply for those new roles; and
- Reasonable time off (on pay) will be provided to significantly affected staff to attend career support sessions, retraining or interviews (including with external organisations), throughout the consultation process, during feedback review and after the final decision has been issued.

## Terms and conditions of redeployment into new IEA roles

For employees whose roles are disestablished through this process and who are redeployed to a new role with Te Whatu Ora in a position covered by an Individual Employment Agreement (i.e. a role not covered by a MECA), the following would apply:

- Appointments to new positions not covered by a MECA will be based on the current Te Whatu Ora IEA; and
- No terms and conditions of the employee's previous employment agreement will be grand-parented; and
- Salary equalisation will only be offered where it is a term of the individual's previous employment agreement.

Please note that as the employment relationship will be continuing, any accrued leave will be carried over to the new position.

## SECTION 6: Getting involved – using the ‘What Say You’ tool to provide feedback

Your feedback is invited and forms a vital part of our consultation process. We want to hear from you.

Please consider:

- Not just ‘what’ but also ‘how’ we get to the next stage of where we’re trying to go.
- What opportunities do you see that we may have missed?
- What are the risks that you see that we need to consider?
- Are there other alternative ways we should be considering? If yes, please let us know along with the benefits of an alternative approach.

Individuals who are directly and significantly affected by the proposal will be advised individually (where possible) or in regional group meetings. Where applicable unions will also be invited to attend these meetings. Significantly affected individuals will also receive an individual letter and a copy of this discussion document.

Individuals who are more broadly impacted (e.g. a proposed change of line manager) will receive a letter only. At that point the discussion document will be shared more widely across the all of the various Business Units of Te Whatu Ora.

All significantly affected and impacted individuals will also be pre-registered with ‘What Say You’ to enable them to feedback on the proposed changes.

Consultation is your opportunity as part of this formal process to provide your feedback on the proposal. The level of detail in this discussion document is provided so that you have access to all relevant information about the proposed changes and how the proposal could potentially affect you. Your feedback will be used to ensure we have considered all available options in determining the best way to move forward and structure ourselves to meet the healthcare needs of our communities.

For your feedback to be most effective, we suggest the emphasis is on suggesting alternatives and outlining the benefits those alternatives would bring. When providing feedback, we ask that you be constructive in your comments, suggestions and alternatives. While there is no way to guarantee that we will make a final decision which everyone agrees with, all matters you raise will be carefully considered.

The consultation commences with the release of this discussion document. Please provide feedback using our online portal ‘What Say You’ by close of business Friday 28<sup>th</sup> April 2023.

Those not significantly affected or impacted and wanting to provide feedback can register and provide feedback through ‘What Say You’ via our Consultation Hub (<https://tewhatauora.wsy.nz/>). This site provides more information on ‘What Say You’: a participant guide, how to register and FAQs. If you have questions or require help, please contact [enabling.consultation@health.govt.nz](mailto:enabling.consultation@health.govt.nz).

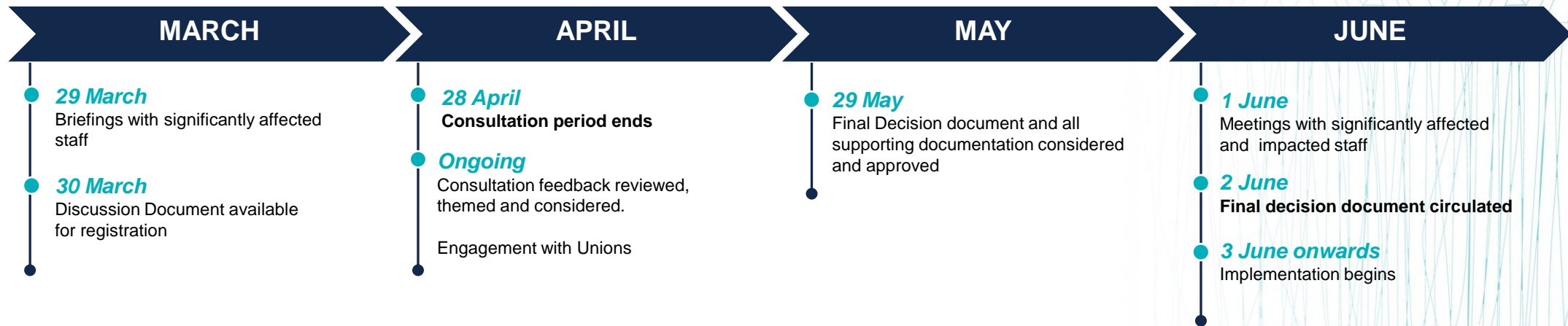
During the consultation period further webinars and Q&A sessions will be run so that individuals can be provided with more information, ask questions and raise issues and concerns around the content of the Discussion Document.

Should individuals have questions around their specific situation then they should reach out to their local People & Culture lead, their P&C Business partner or Advisor, their manager or their union representative. Once we have considered all the feedback, we will begin to confirm the outcome of this consultation process.

We are aiming to make final decisions on this proposal, and the flow-on implications by 2 June 2023.

Thank you for taking the time to look through this proposal. We look forward to hearing your thoughts.

## SECTION 7: Indicative Timeframe



## SECTION 8: Support and well-being

As outlined in earlier sections, our environment has evolved, and as such we need to adapt to ensure our health care services are meeting our community and patients' needs now and into the future.

It is important to seek support and reach out if/when you need to. Make time to read the proposal and the supporting information. Please ask for support anytime you need it and encourage your colleagues to do the same. Talk about how you are feeling. Talk to your manager, colleagues, your union representative or friends and family.

Sometimes a colleague may be more vulnerable to the impacts of change because of other things happening in their lives. If you have concerns about anyone's well-being, contact P&C for advice. If you are a manager or team leader and are concerned about one of your team members, please talk to them or seek advice from your People & Culture team.

Additionally, Employee Assistance Programme (EAP) confidential counselling services are also available to you for personal support in every district. Please reach out to your current provider to access this free service as they will be able to provide practical strategies and assistance in support of personal and workplace issues, workplace changes, life transition and career planning, budgeting and financial assistance, and personal legal advice.

Well-being check-ins with all significantly affected staff (those that are proposed to be disestablished) will be available following the notification meeting. This will give staff a forum to discuss any individualised support that they need.

### Career Transition Service

For those significantly affected i.e. their position is proposed to be disestablished, we will offer wraparound support including career advisory support to assist in identifying all possible options for these individuals.

The Te Whatu Ora Career Transition Centre services provide proactive practical help, advice and support to employees who are going through proposed changes in their roles due to change management processes.

Going through change can be daunting, and the prospect of finding another position can feel overwhelming, especially if the job change was unexpected. With emotions high, career transition services provide a professional, independent, and impartial sounding board for employees to consider their career options moving forward.

The Career Transition Service will work in partnership with specific groups of employees to provide confidential, holistic, and tailored 1:1 career coaching, facilitated workshops, tools and resources to support employees at every stage as they go through this process.

The team of career transition coaches will work with employees to make well thought out career decisions based on their key strengths, interests, values and needs, attributes, and career opportunities that are available to them. The goal is to empower our employees to successfully move onto the next stage of their careers.

The Career Transition Coach will work with a group of employees in many ways including on how to:

- deal effectively with personal change;
- identify core values, capabilities, skills and experience;
- prepare and plan for the next chapter of their careers;
- explore preferred career options and evaluate alternative career options;
- develop personal marketing tools such as LinkedIn, CVs and covering letters;
- prepare for an effective job search campaign;
- network strategically;
- consider and evaluate new career opportunities and support them to complete their applications successfully; and
- understand the dynamics of the interview process and negotiating their salary package.

The Career Transition Service will provide group workshops on a range of career related topics, 1:1 tailored coaching and resources and tools to help affected employees to define their key strengths, understand their passions and key values and drivers for the future, and help them to secure a new job opportunity as soon as possible.

To support this proposal, consideration has been given to the responsibilities for proposed new positions. The below outlines the proposed new positions, core purpose and some examples of deliverables.

Office of the CFO	Position Title: Treasurer	FTE: 1.0	Reports To: Director, Office of the CFO
<p><b>Core Purpose:</b></p> <p>Managing Te Whatu Ora's financial resources and financial well-being, ensuring cashflow adequacy/liquidity, effectiveness of lines of credit and optimising investments, while also overseeing the insurance programme and managing relationships with bankers, insurers, brokers and sector stakeholders.</p>	<p><b>Objectives/KRA's:</b></p> <ul style="list-style-type: none"> <li>• Smoothly functioning banking operations and payment processing for the entire organisation.</li> <li>• Optimised management of cash, investments and lines of credit in compliance with Te Whatu Ora Treasury and other policies and meeting regulatory requirements.</li> <li>• Effective insurance placement and management of the insurance portfolio and related risks.</li> </ul>		<p><b>Knowledge, Skills, Tools, Experience:</b></p> <p><b>Knowledge &amp; Skills:</b></p> <ul style="list-style-type: none"> <li>• Technical expertise in accounting, finance and extensive knowledge and experience in treasury and banking functions including bank reconciliations, cashflow and investment management in a large organisation.</li> <li>• Demonstrable leadership &amp; management skills with experience in managing diverse functions and teams, preferably with teams spread across wide geographical boundaries and managing a wide range of stakeholders.</li> <li>• Financial and investment planning and management with practical experience in assessing and managing financial risks including managing insurance programmes.</li> </ul> <p><b>General Experience:</b></p> <ul style="list-style-type: none"> <li>• At least 10 years' experience with the latest 5 years' operating at a senior or executive management level to draw on leadership, financial and risk management skills.</li> </ul> <p><b>Tool Specific Experience:</b></p> <ul style="list-style-type: none"> <li>• Experience with Oracle/FPIM financial systems or equivalent.</li> </ul>



<p><b>All Business Partnering Divisions</b></p>	<p><b>Position Title: General Managers, Finance Business Partner (Hospital &amp; Specialist Services, Commissioning and National Functions)</b></p>	<p><b>FTE: 11.0</b></p>	<p><b>Reports To: Heads of Finance, Hospital &amp; Specialist Services, Commissioning and National Functions as appropriate</b></p>
<p><b>Core Purpose:</b></p> <p>Partner with the Regional Director to:</p> <ul style="list-style-type: none"> <li>• Ensure sound fiscal analysis underpins advice to the business in performance analysis, planning, business cases and other assessments for their areas of responsibility and in alignment with national guidance;</li> <li>• Provide clear performance information to position the relevant business unit for success; and</li> <li>• Lead and support the harmonisation of district and regional reporting in accordance with National Finance directives.</li> </ul>	<p><b>Objectives/KRA's:</b></p> <p>Partner with the appropriate business leads to:</p> <ul style="list-style-type: none"> <li>• Drive performance by providing visibility into variance and intensive support when required;</li> <li>• Enhance and standardise the approach to financial decision making (business cases and financial analyses);</li> <li>• Uplift capability in financial decision making and support the business with tools, data, and models to incentivise superior performance based on approaches developed by Reporting, Costing, and Standards team;</li> <li>• Ensure planning, prioritisation and funding is informed by robust financial analysis;</li> <li>• Collaborate with all other business partner leads to ensure shared understanding and consistent approaches;</li> <li>• Coordination and review of planning for their area of responsibility (incl opex and capital budgets);</li> <li>• Identify opportunities for process change and support those activities when led by the business with a focus on their area of responsibility; and</li> <li>• Support good financial control processes.</li> </ul>	<p><b>Knowledge, Skills, Tools, Experience:</b></p> <p><b>Knowledge &amp; Skills:</b></p> <ul style="list-style-type: none"> <li>• Ability to engage in strategic discussions about the health system and the reforms.</li> <li>• A successful track record in delivering and supporting change, performance development, and collaborating effectively at senior levels.</li> <li>• Technical expertise in accounting, finance and extensive knowledge and experience in cost accounting and performance analytics, as appropriate to the business unit with which they liaise.</li> <li>• Highly motivated and visible leader who can demonstrate leadership &amp; experience in managing diverse functions and teams, preferably with teams spread across wide geographical boundaries and managing a wide range of stakeholders.</li> </ul> <p><b>General Experience:</b></p> <ul style="list-style-type: none"> <li>• At least 10 years' experience with the latest 5 years' operating at a senior or executive management level to draw on leadership, financial and risk management skills.</li> <li>• Credibility with and proven ability to liaise with the relevant specialist staff within their business units.</li> </ul> <p><b>Desirable Tool Specific Experience:</b></p> <ul style="list-style-type: none"> <li>• FPIM and associated technology environment.</li> <li>• Financial reporting tools (e.g. Qlik).</li> <li>• Financial Reporting, budgeting, and planning systems.</li> <li>• Advanced excel.</li> <li>• Forecasting.</li> <li>• Costing systems.</li> </ul>	

## Reporting, Costing & Standards

Position Title: GM, Financial Reporting & Performance

FTE: 1.0

Reports To: Director, Reporting, Costing and Standards

### Core Purpose:

- Manage the production and distribution of management reports to business partners and budget holders to enable them to manage their functions, including operational performance reporting and benchmarking.
- Ensure ad hoc reporting requests are answered in a consistent manner, deriving data from a single source of truth, whilst liaising with the GM, and Data Analytics to ensure the analysis is delivered.
- Ensure that non-finance data systems are developed in conjunction with other stakeholders, such that reporting suites are relevant, actively used by decision makers, and support system and service improvements.

### Objectives/KRA's:

- Reliable and high-quality reports.
- High level of credibility with stakeholders (i.e. users, management, governing bodies and external stakeholders).
- Reports are consistent, easy to read, understand and query
- Reports to be accompanied by insights and queries raised to functional leadership.
- Reports on benchmarking to be delivered in conjunction with and aligned with other enabling functional groups (Data & Digital, People & Culture).

### Knowledge, Skills, Tools, Experience:

#### **Knowledge & Skills:**

- Technical expertise in report content and up to date with trends and capabilities - best practice and national and international trends.
- Leadership & management of diverse teams, preferably in a setting with geographically dispersed staff.
- Ability to communicate over all levels of the organisations, both suppliers of information, (Data & Digital, People & Culture) as well as end users.
- Management of key information resources and processes for consistency, accuracy and timeliness.

#### **General Experience:**

- Required to draw on skills and experience related to specific activities, equipment, or work practices – **5-10 years**.
- Experience in benchmarking, preferably in the public health setting.

#### **Tool Specific Experience:**

- Reporting tools, and awareness of technology environments and changes in technology.

## Reporting, Costing & Standards

Position Title: GM, Professional Standards, Standardisation and QA

FTE: 1.0

Reports To: Director, Reporting, Costing and Standards

### Core Purpose:

- Ensure analysis is robust, accurate, logical, and persuasive.
- Reports and other information are internally and externally consistent, including ensuring raw data is consistent, common methodologies are applied, and results are presented in a standard way.
- Guidance for forecasting and budgeting is developed to ensure consistent and appropriate processes and outputs are achieved.
- Ensure the quality of Business Cases is maintained and monitored.
- Champion of continuous improvement for all analytic activities across Te Whatu Ora.

### Objectives/KRA's:

- Single processes are developed, implemented and monitored for compliance.
- Professional standards are maintained and enhanced. Education of stakeholders is provided, within the framework of continuous improvement.
- Supports business partners across the finance function to deliver consistent, reliable and robust analysis, and engages with those business partners appropriately to encourage or sanction as required.

### Knowledge, Skills, Tools, Experience:

#### **Knowledge & Skills:**

- Highly credible finance practitioner with a focus on excellence in analysis.
- Expertise in professional leadership and development, content and up to date with trends and capabilities- best practices and national and international trends.
- Leadership & management of diverse teams.
- Ability to communicate over all levels of the organisations.
- Management of key information resources and processes for consistency, accuracy and timeliness.

#### **General Experience:**

- Required to draw on skills and experience related to specific activities, equipment, or work practices – **5-10 years**.
- Experience in managing and developing/training finance and other staff in the public health setting.

#### **Tool Specific Experience:**

- Reporting tools as appropriate.

Reporting, Costing & Standards	Position Title: GM, Data Analytics	FTE: 1.0	Reports To: Director, Reporting, Costing and Standards
<p><b>Core Purpose:</b></p> <ul style="list-style-type: none"> <li>• Manage the analysis of information produced by Te Whatu Ora finance and costing systems.</li> <li>• Technical leader for the finance analytic function, including people leadership, liaising with People &amp; Culture regarding professional development and career pathways.</li> <li>• Enable key analytic functions related to technology platforms and languages, access to key data sets and critical applications such as machine learning.</li> </ul> <p><b>Objectives/KRA's:</b></p> <ul style="list-style-type: none"> <li>• Reliable &amp; high-quality analysis.</li> <li>• Finance function is employer of choice for analysts.</li> <li>• Turnover, recruitment and promotions are all managed to support a healthy team environment for analysts.</li> <li>• High level of credibility with stakeholders (i.e. users, management, Governing bodies and external stakeholders).</li> <li>• Consistent, easy to understand, and relevant to decision makers.</li> </ul>		<p><b>Knowledge, Skills, Tools, Experience:</b></p> <p><b>Knowledge &amp; Skills:</b></p> <ul style="list-style-type: none"> <li>• Expertise in data analytics, systems and methodologies. Up to date with trends and capabilities- best practice and national and international trends.</li> <li>• Leadership &amp; management of diverse teams.</li> <li>• Ability to communicate over all levels of the organisations.</li> <li>• Management of key information resources and processes for consistency, accuracy and timeliness.</li> </ul> <p><b>General Experience:</b></p> <ul style="list-style-type: none"> <li>• Required to draw on skills and experience related to specific activities, equipment, or work practices – <b>5-10 years</b>.</li> <li>• Experience of managing and developing data analytics and insights.</li> <li>• Credible analyst as a core competency.</li> </ul> <p><b>Tool Specific Experience:</b></p> <ul style="list-style-type: none"> <li>• Reporting tools, and awareness of technology environments, and changes in technology.</li> </ul>	

## Performance Improvement & Benefits Realisation

Position Title: GM, Performance Monitoring

FTE: 1.0

Reports To: Director, Performance Improvement & Benefits Realisation

### Core Purpose:

- Identify and deliver on costs savings and efficiency opportunities.
- Intensive support for departments struggling with financial pressures.
- Ensure benefits realisation of organisation-wide initiatives such as new supplier contracts and business cases.
- Continual review of the organisation's financial performance.

### Objectives/KRA's:

- Deliver cost savings.
- Identify efficiency opportunities.
- Benefits realisation.
- Supplier contract compliance.
- Monthly financial review of organisation's financial performance.
- Review/ validation of forecasts and budget iterations.
- Benchmarking analysis – financial and operational.
- Business Case support and post occupancy analysis.

### Knowledge, Skills, Tools, Experience:

#### **Knowledge & Skills:**

- Proven experience in turn-around of poorly performing departments – advantageous if delivered in a health care setting.
- Leadership & management of diverse teams, preferably in a setting with geographically dispersed staff.
- Proven commercial acumen – advantageous if in a health setting, but not a prerequisite.
- Communication and interpersonal skills including the ability to develop and maintain strong relationships with diverse stakeholders – including Executive and board levels.
- Track record in improving organisational performance and building high performing teams.

#### **General Experience:**

- Required to draw on skills and experience related to specific activities, equipment, or work practices – **10+ years** at CFO, Finance Manager or Consulting Director level.

## Performance Improvement & Benefits Realisation

Position Title: GM, Continuous Improvement

FTE: 1.0

Reports To: Director, Performance Improvement & Benefits Realisation

### Core Purpose:

- Drive continuous improvement throughout the organisation.
- Oversee continuous improvement initiatives.
- Support whole organisation wherever improvement processes are being considered.
- Identify opportunities, solutions, and creative ideas for performance improvement (quality, service, efficiency, productivity, cost).

### Objectives/KRA's:

- Deliver solutions and creative ideas for performance enhancement.
- Deliver training on continuous improvement tools and techniques.
- Engage with finance business partners to evaluate project savings estimates, validate reported continuous improvement benefits, and ensure accurate accounting of continuous improvement productivity.

### Knowledge, Skills, Tools, Experience:

#### **Knowledge & Skills:**

- Track record of delivery of continuous improvement projects.
- Proven history of establishing continuous improvement processes within large organisations.
- Proven experience in the development and implementation of strategies to deliver improvement to, and alignment of systems and process.
- Proven track record in building high performing teams.
- Ability to build and manage relationships with diverse stakeholders, up to Executive and Board level.

#### **General Experience:**

- Required to draw on skills and experience related to specific activities, equipment, or work practices – **7+ years** in senior Continuous Improvement roles.

## Financial Services Division

Position Title: GM, Financial Control

FTE: 1.0

Reports To: Director, Financial Services

### Core Purpose:

To ensure Te Whatu Ora has sound financial accounting and internal control policies, systems and processes.

### Objectives/KRA's:

- Timely, accurate and complete financial reporting (Internal and external).
- High level of credibility with auditors, regulators, and other key external parties.
- Compliance with Public Finance Act, tax and other relevant legislation, standards and treasury guidelines.

### Knowledge, Skills, Tools, Experience:

#### **Knowledge & Skills:**

- Technical expertise in accounting/controller role in a large organisation that entails multi-entity consolidation.
- Leadership & management of diverse teams, preferably in a setting with geographically dispersed staff.
- Financial management of key accounting processes for consistency, accuracy and timeliness, including such activities as multi-entity accruals, capital asset registers, and journals.

#### **General Experience:**

- Required to draw on skills and experience related to specific activities, equipment, or work practices – **10+ years**.

#### **Tool Specific Experience:**

- Oracle ERP system.

## Financial Services Division

Position Title: GM, Financial Transaction Services

FTE: 1.0

Reports To: Director, Financial Services

### Core Purpose:

Overall staff management and delivery of accounts payable and accounts receivable transactions for Te Whatu Ora.

### Objectives/KRA's:

- Timely and efficient processing of financial transactions.
- Compliance with financial policies and processes to support sound financial control.
- Drive continuous improvement across a national model through standardisation and automation.

### Knowledge, Skills, Tools, Experience:

#### **Knowledge & Skills:**

- Subject Matter Expert across financial transaction activity within a large complex organisation. Advantage for experience in a health care setting.
- Leadership & management of diverse teams, preferably in a setting with geographically dispersed staff.
- Exposure to large ERP systems – implementations & integrations.
- Communication and Interpersonal skills including the ability to develop and maintain strong relationships with key stakeholders.
- Proven track record in improving organisational culture and building high performing teams.

#### **General Experience:**

- Required to draw on skills and experience related to specific activities, equipment, or work practices – **10+ years**.

#### **Tool Specific Experience:**

- Oracle ERP system.
- EDI, invoice scanning or other payment automation tools.



**It is considered these existing positions would be impacted as follows should this proposal be implemented after this consultation process.**

Given the nature of this change and the bringing together of all the districts and ex shared service agencies into Te Whatu Ora, there will be an impact to a number of current positions. Given the complexity of the system, how positions are grouped together in districts and the quality of the data across the multiple payroll systems, it has been challenging to identify all of the roles and the impact on them. We anticipate that in some cases, this data may be inaccurate in terms of position titles, people in positions etc. which will have led to potential inaccuracies in the impact tables. There may also be some individuals and teams who we have missed as part of this change process.

We apologise in advance for any inaccuracies in the data and if this is the situation then please tell us so we can update the proposal and our systems accordingly. You can do this by posting the details as a question on the 'What Say You' portal page. Note that you can tick "Don't publish this question". This means that your post will NOT be shown to other participants.

*It is proposed the following existing positions will be significantly impacted and due to the level of change, it is proposed these positions are disestablished.*

# Appendix 2: Positions potentially significantly affected - disestablished

It is proposed the following existing positions will be significantly affected and due to the level of change, it is proposed these positions are **disestablished**.

District	Position Title
Auckland	Chief Financial Officer
Auckland	Deputy Chief Financial Officer
Bay of Plenty	Chief Finance Officer
Canterbury & West Coast	Executive Director Finance & Corporate Services
Canterbury & West Coast	Deputy Chief Financial Officer
Capital, Coast & Hutt Valley	Executive Director Finance
Counties Manukau	Chief Financial Officer
Counties Manukau	Deputy Chief Financial Officer (2 positions)
Hawkes Bay	Executive Director Financial Services
Health Alliance	Chief Financial Officer
Health Source	Chief Financial Officer
Health Source	Financial Transactions Manager
Health Source	Manager Financial Control
Lakes	Chief Financial Officer
Mid-Central	General Manager Corporate Services
Mid-Central	Deputy Chief Financial Officer

District	Position Title
Nelson Marlborough	GM Finance Performance & Facilities
Northland Regional Alliance	Chief Financial Officer - Corporate & Finance
Northland	Chief Financial Officer
NZ Health Partnerships	GM Corporate & Finance
South Canterbury	Director Corporate Services, Funding & Planning
Southern	Executive Director Corporate Services
Tairāwhiti	Chief Financial Officer / Group Manager Finance, Procurement & Facilities
Taranaki	General Manager Finance / Commercial
TAS	Finance Manager
Te Whatu Ora Corporate	Lead, Corporate Finance
Waikato	Executive Director Finance
Wairarapa	General Manager Finance & Corporate Services
Waitemata	Chief Financial Officer
Waitemata	Deputy Chief Financial Officer
Whanganui	General Manager Corporate

# Appendix 2: Positions potentially impacted – Change of reporting line

It is proposed the following positions will be impacted as a result of a change in line management, but will remain in the Finance Business Unit. Although this reflects some change, these proposed changes are not significant and the positions remain required and in the proposed future structure.

These positions currently report into a role it is proposed is disestablished. In the event any or all of the roles listed above are disestablished their line reports would change to one of the proposed new tier 4 positions.

At this stage we cannot be definitive in terms of which tier 4 role the individual reporting line will change to, however, is likely that a number of appointments into these new positions will come from our existing team.

Where practicable we want tier 4 leaders to be co-located with the teams they will temporarily lead until longer term decisions are taken. Decisions on which tier 4 position will manage which local teams will therefore be made when appointments are confirmed.

District	Position Title
Auckland	Finance Manager
Auckland	Operational Finance & Planning Manager
Auckland	Management Accountant (2 positions)
Bay of Plenty	Finance Manager
Bay of Plenty	Finance Process Lead
Canterbury & West Coast	Accounts Supervisor
Canterbury & West Coast	Business Manager
Canterbury & West Coast	Executive Assistant
Canterbury & West Coast	Finance Business Partnering Manager (5 positions)
Canterbury & West Coast	Finance Manager (2 positions)
Canterbury & West Coast	Financial Controller
Canterbury & West Coast	Management Accountant
Canterbury & West Coast	Manager Finance Business Partnering
Canterbury & West Coast	Manager Finance & Procurement Systems
Canterbury & West Coast	Senior Accountant
Canterbury & West Coast	Senior Financial Adviser
Capital, Coast & Hutt Valley	GM Corporate Transformation
Capital, Coast & Hutt Valley	GM Finance
Capital, Coast & Hutt Valley	GM Operational Finance & Planning

District	Position Title
Capital, Coast & Hutt Valley	GM Payroll / Finance Manager
Capital, Coast & Hutt Valley	Programme Manager
Counties Manukau	Data & Digital CFO Delegate
Counties Manukau	Executive Assistant
Counties Manukau	Finance Lead NRHCC
Counties Manukau	Finance Manager
Counties Manukau	Business Manager (7 positions)
Counties Manukau	ACC Projects Manager
Counties Manukau	Executive Assistant
Counties Manukau	Management Accountant (3 positions)
Counties Manukau	Group Finance Manager
Counties Manukau	Business Analyst
Counties Manukau	Corporate Finance Mgr/Systems Analyst
Counties Manukau	Document Controller
Counties Manukau	Senior Analyst
Hawkes Bay	Executive Assistant
Hawkes Bay	Head of Business Partners
Health Alliance	Head of Finance
Health Promotion Agency	Financial Controller
Health Share	Financial Accountant
Health Share	Financial Controller
Health Source	Asset & Project Accountant

# Appendix 2: Positions potentially impacted – Change of reporting line

District	Position Title
Health Source	Asset & Project Officer
Health Source	Asset & Project Team Leader
Health Source	Assistant Accountant (5 positions)
Health Source	Business Manager
Health Source	Business Performance Advisor
Health Source	Eligibility Assessment Manager
Health Source	Financial Accountant (6 positions)
Health Source	Payroll Accountant
Health Source	Team Leader Accounts Payable (2 positions)
Health Source	Team Leader Accounts Receivable (2 positions)
Lakes	Accounts Payable Officer / PA
Lakes	Finance Manager
Lakes	Manager Decision Support Unit
Lakes	Personal Assistant
Mid-Central	Executive Assistant
Mid-Central	Principal Data Analyst
Mid-Central	Senior Accountant
Mid-Central	Financial Accountant
Mid-Central	Systems Accountant
Mid-Central	Manager Business Advisory
Nelson Marlborough	Finance Manager Clinical Services
Nelson Marlborough	Finance Manager Mental Health
Nelson Marlborough	Finance Manager Primary & Community
Nelson Marlborough	Manager Asset Management
Nelson Marlborough	Manager Commercial Support
Nelson Marlborough	Manager Financial Operations
Northern Regional Alliance	Accountant
Northern Regional Alliance	Team Coordinator
Northland	Executive Assistant
Northland	Finance Manager
NZ Health Partnerships	Senior Finance Manager
South Canterbury	Finance Manager

District	Position Title
Southern	Financial Controller
Southern	Management Accountant
Southern	Personal Assistant
Tairāwhiti	Finance Manager
Tairāwhiti	Personal Assistant
Taranaki	Group Financial Manager
TAS	Accounts Payable Officer
TAS	Management Accountant
TAS	Programme Accountant
Health Promotion Agency	Finance Team Lead
Health Promotion Agency	Manager Office Services
Waikato	Director Finance Projects
Waikato	Director of Finance & Advisory
Wairarapa	Business Service Manager
Wairarapa	Senior Contracts Advisor
Waitemata	Chief Executive Well Foundation
Waitemata	Executive Assistant
Waitemata	Group Manager
Waitemata	Project Manager
Waitemata	Manager Decision Support Unit (2 positions)
Waitemata	Manager Information Technology & Business Analysts
Waitemata	Group Finance Manager (2 positions)
Waitemata	Personal Assistant
Waitemata	Analyst
Whanganui	Executive Assistant
Whanganui	Financial & Business Support Manager

# Appendix 2: Positions & Teams proposed to move to different Business Units

The following individual roles and whole teams are better aligned to other Business Units within Te Whatu Ora and it is recommended these individuals and teams refer to the change proposals for the Business Units annotated below when they become available. Note that no changes are proposed to these roles until the proposals for the relevant Business Unit (as noted below) are released.

District	Team / Position Title	Business Unit document to refer to
Auckland	General Manager Commercial Services	Hospital & Specialist Services
Auckland	Director Facilities & Development	Investment & Infrastructure
Bay of Plenty	Transport Coordinator	Hospital & Specialist Services
Bay of Plenty	Transport Coordinator	Hospital & Specialist Services
Bay of Plenty	Senior Procurement Specialist	Hospital & Specialist Services
Bay of Plenty	Supply Chain Manager	Hospital & Specialist Services
Canterbury & West Coast	Supply Chain Manager	Hospital & Specialist Services
Hawkes Bay	Payroll Manager	People & Culture
Hawkes Bay	Facilities Manager	Investment & Infrastructure
Hawkes Bay	Enterprise Risk Manager	Risk Audit & Assurance
Hawkes Bay	Risk & Assurance Manager	Risk Audit & Assurance
Lakes	Project Coordinator / Change Manager	People & Culture
Lakes	Payroll Manager	People & Culture
Lakes	Acting Payroll Manager	People & Culture

District	Team / Position Title	Business Unit document to refer to
Mid-Central	Director Facilities & Estate Management	Investment & Infrastructure
Mid-Central	Director Facilities Development	Investment & Infrastructure
Mid-Central	Emergency Response Manager	Emergency Management
Mid-Central	Principal Business Advisor - Redevelopment Programme	Investment & Infrastructure
Mid-Central	Contracts and Facilities Procurement Advisor	Hospital & Specialist Services
Mid-Central	Senior Contracts Administrator	Hospital & Specialist Services
Nelson Marlborough	Facilities Manager	Investment & Infrastructure
Nelson Marlborough	Project Manager	Investment & Infrastructure
Nelson Marlborough	Manager Service Supply	Hospital & Specialist Services
Nelson Marlborough	Manager Procurement & Supply Chain	Hospital & Specialist Services
Northland	Director Infrastructure & Commercial Services	Investment & Infrastructure
Northland	Chief Information Officer	Data & Digital
Northland	Patient Transport & Accommodation Manager	Hospital & Specialist Services
Northland	Commercial Services Manager	Hospital & Specialist Services
South Canterbury	Facility & Maintenance Manager	Investment & Infrastructure
South Canterbury	Support Services Manager	Hospital & Specialist Services

# Appendix 2: Positions & Teams proposed to move to different Business Units (continued)

District	Team / Position Title	Function
Southern	Executive Assistant	Commissioning
Southern	General Manager Community Services	Hospital & Specialist Services
Southern	Procurement & Supply Chain Manager	Hospital & Specialist Services
Southern	Funding Manager	Commissioning
Southern	Director of Allied Health & Scientific Technology	Hospital & Specialist Services
Southern	Payroll Manager	People & Culture
Southern	Planning and Accountability Manager	Commissioning
Southern	General Manager Primary Care and Population Health	Commissioning
Southern	Director of Nursing	Commissioning
Southern	General Manager Facilities & Property	Investment & Infrastructure
Southern	Service Manager	Hospital & Specialist Services
Tairāwhiti	Manager (Landlord)	Hospital & Specialist Services
Tairāwhiti	Manager Non-Clinical Support	Investment & Infrastructure
Tairāwhiti	Logistics Manager	Hospital & Specialist Services

District	Team / Position Title	Function
Taranaki	Payroll Manager	People & Culture
Taranaki	Chief Information Officer	Data & Digital
Taranaki	Media & Communications Manager	People & Culture
TAS	Payroll Administrator	People & Culture
Waikato	Director of Finance & Advisory	Hospital & Specialist Services
Waikato	Project Director	Hospital & Specialist Services
Wairarapa	Building & Property Services Manager	Investment & Infrastructure
Wairarapa	Executive Assistant	Commissioning
Waitemata	Business Partner Commercial	Hospital & Specialist Services
Whanganui	Manager Supply Services	Hospital & Specialist Services
Whanganui	Project Manager	Hospital & Specialist Services
Whanganui	Facilities Service & Project	Investment & Infrastructure
Whanganui	Payroll Manager	People & Culture

#	Question	Answer
1	What is the purpose of the new finance team structure?	The new finance team structure is part of the work to deliver on the objectives of the Pae Ora Act 2022, which established Te Whatu Ora. A key step was the Unify to Simplify consultation, which resulted in a change in the reporting lines of district chief financial officers into the national finance function. The proposed structure is the next step in implementing a national finance function that is coherent, efficient and supports the evolving structure of Te Whatu Ora. We have been calling this work the development of the finance operating model.
2	What roles will be included in later consultations and when?	We intend to undertake further consultations in due course – while the next consultation is expected to include Tier 5 managers, it could be wider. We won't be able to confirm which roles are included in the next proposal until decisions are made on the current proposal and until further planning is done. We are really mindful that many people find uncertainty difficult and will keep you updated.
3	How did you come up with the finance proposal? What discussions were had and who was involved?	Work on the finance operating model began with a workshop with about 75 senior finance leaders from across the motu in September last year, with a follow up session with that group in November. In addition, in October 2022, Rosalie Percival, Chief Financial Officer, shared her views on the objectives of the finance function to two hundred staff at the Health Sector Finance Workshop held in Hamilton. This mahi informed key areas of the proposal.
4	What will happen to key projects and programmes for finance like HSAAP and FPIM?	Projects underway will continue. The Health Sector Agreements and Payments (HSAAP) and FPIM (Finance Procurement and Information Management) implementations are not impacted by the restructure, and the programmes are expected to continue until completed. HSAAP sits under Sector Operations in the organisational chart in the proposal.
5	Will anyone in finance have to change offices or workspaces?	We do not intend for current finance roles to be required to move locations.
6	How will the new structure impact our ability to attract and retain finance talent?	Te Whatu Ora is the largest organisation in New Zealand, and we aim to be an employer of choice. As this country's largest employer, we intend to provide far greater opportunities for career development and progression than was ever possible in the previous organisations.

#	Question	Answer
7	How will the new structure improve our decision-making processes?	The structure is designed to ensure the right information is available at the right time to support effective decision-making across the organisation.
8	What are the transitional arrangements to manage risk?	We will be aiming to move quickly into the new positions. We do anticipate there will be transitional arrangements required. We intend to minimise disruption to staff, including by using the time between the final decision announcement and the new structure being put in place to clarify reporting lines, as well as making any changes to processes and ways of working to support the change. In the interim, normal finance activity will continue unchanged.
9	Is there any change to the process of paying suppliers?	Staff should continue to use the current processes. We don't expect there will be any change to arrangements to pay suppliers.
10	Are our finance budgets going to be adjusted to reflect the results of this consultation?	We will reconsider the 2023/24 finance budget as required to reflect any changes to the operating model, following any decisions taken as a result of this consultation.
11	How are we ensuring continued financial leadership in the districts longer-term?	The discussion document proposes moves from functional leadership at the local level to functional leadership at the local and regional level, with support for staff working locally. The strong response of the health sector to the pandemic has shown us what incredible mahi can be achieved by virtual teams working remotely and supported by modern technology.
12	How are financial delegations going to work across districts, regional, and corporate?	We still intend to implement the new delegations policy before 30 June 2023. Please continue to follow your existing delegations policy until you are informed that a new national policy is in effect.



# Appendix 4: Engagement Plan

Ref	Engagement Activity (including location)	Purpose of activity	Form of engagement	Date of engagement	Engagement Owner
1	Finance Leaders Video Calls	Enable people leaders to provide change updates, test sentiment and support their people. Support people leaders as they lead through disruption	Virtual	April Mon 3, Mon 17, Mon 24 2023	Rosalie Percival, Mark Woodard, HR
2	All Finance Staff Hui (online)	Summary of Consultation Document Outline Process Convey supports and services available Q&A	Virtual	5 April 2023	Rosalie Percival, Mark Woodard, HR
3	Christchurch presentation and Q&A	See above	Face to Face	Wed 12 April	Rosalie Percival, Mark Woodard, HR
4	Auckland presentation and Q&A	See above	Face to Face	Thurs 13 April	Rosalie Percival, Mark Woodard, HR
5	Hamilton presentation and Q&A	See above	Face to Face	Thurs 13 April	Rosalie Percival, Mark Woodard, HR
6	Wellington presentation and Q&A	See above	Face to face and virtual	Fri 14 April	Rosalie Percival, Mark Woodard, HR