



## Personal Profile Qualifications

### Key Experience

- ① Experienced NHS Director of Finance working across Unitary Boards and Integrated Systems
- ① Experienced Turnaround Director at Provider and Commissioner organisations
- ① Over 27 years of director level experience in public sector across provider, commissioner and commercial activities
- ① Proven track record of managing organisational and legislative change
- ① Financial Track Record across different sectoral financial regimes
- ① Technically strong across finance, digital, estates, performance & governance
- ① Heavily experienced in delivering organisational/system Transformation & Integration
- ① Facilitating collaboration and co-production of health & care solutions.
- ① Executive coaching
- ① Advisory roles to private healthcare and property investment.
- ① Networked with private sector in areas such as venture capital, legal, commercial and technology.

### Qualifications

- ① ILM Level 7 in Corporate Coach International – Accredited Executive Leadership Coach (2023)
- ① GCHQ Certified Executive Training – Cyber Security (2022)
- ① Member of the national Casemix Advisory Board since 2020
- ① HFMA study tour of Australian health system 2014
- ① Accountable Officer Accreditation – Hay Group assessed 2014
- ① NHS Commissioning Board Assessor for CCG authorisation during 2012/2013
- ① CFO Accreditation – Penna (2012); CCAB qualified since 1991
- ① Board Level Director 2 Programme (2011/12) - North West Leadership Academy/Centre for Innovation & Management – Leeds University
- ① NHS Strategic Financial Leadership Programme - Monitor/Department of Health/London Cass Business School (2010)
- ① NHS Northwest Emerging Leaders Programme (2004 – 2006) inc. studies of European health systems
- ① Diploma holder in Neuro Linguistic Programming (2011)
- ① PRINCE II Practitioner qualified (2004)
- ① Mentor on NHS Northwest Mentoring Scheme since 2010
- ① Post Graduate Diploma in Business Administration (DBA) 2000

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### Professional Profile

Iain is an experienced leader who is passionate about making a real difference in healthcare. Throughout his career he has been on a mission to transform and improve healthcare services, especially in collaboration with the NHS and Local Government.

His recent role with the dynamic Executive Team at St. Helens was all about driving positive change in our community's health and care system, he truly believes that where we live and work matters and sometimes courage is needed to reform and transform.

Iain's wealth of experience aligns with what is needed as an executive director in the NHS. He possesses a deep understanding of governance, finance, and change management – all essential for effective oversight and making informed decisions that benefit everyone. What also sets him apart is his ability to lead with a smile, foster great relationships, and inspire teams with a clear vision for the future. As a leader, Iain has always been dedicated to aligning his work with the core principles and standards set forth by the NHS.

Throughout Iain's career, he has consistently upheld these principles and best practice to ensure that services are delivered in a patient-centred and evidence-based manner. This commitment to aligning with national standards and promoting excellence has been a hallmark of his leadership.

Iain's experience in leadership roles within and outside the NHS reflects his adaptability and resilience in the face of complex challenges, including those related to financial governance:

- Successfully operating as the director lead for an NHS Mental Health provider seeking authorisation as an NHS Trust, ensuring compliance with legal, constitutional, governance, financial, and performance requirements, including rigorous oversight. This experience underscored his ability to oversee financial governance and compliance requirements.
- Leading and developing an organisation within the Courts service, creating the necessary vision, culture, values, corporate governance, and strategies for effective stewardship and control. This experience highlights his capacity to establish mechanisms of financial control and governance; essential qualities in all organisations.
- Leading the re-engineering of a Mental Health Trust's business within the NHS, transitioning from an inpatient focus to an emphasis on community-based services, which involved significant negotiation, collaboration, and transformation of services while ensuring adherence to the principles of the NHS National Service Framework for Mental Health. This was about creating an environment that supported people. This demonstrated the ability to manage financial and operational changes effectively, aligning with the responsibilities of a Unitary Board member.



## Career Summary & Assignments Undertaken

### CFO level associated work, Cheshire & Merseyside ICB July 2022 to December 2023

- ① Closing down of CCG operations and transfer to ICB
- ① Supporting design and development of new ICB architecture.
- ① Development of financial plans for St Helens Place.
- ① Specific support to C&M Acute & Specialist Trust Provider collaborative around business and clinical support services / Efficiency at Scale
  - Legal services across multiple providers
  - Standard ledger system for 17 providers
  - Elective recovery and governance
- ① Financial Turnaround approach for Liverpool Place
- ① Delivery of medium-term approach to secure elective Independent Sector capacity & delivery aligned to Regional Office requirements.

### Chief Finance Officer & Turnaround Director, St Helens CCG Dec 2016 – June 2022

#### Local & St Helens System

- ① Executive Board Member, SIRO & Cyber lead
- ① Executive lead on Financial Sustainability and Recovery for the CCG and St Helens ICP partners.
  - (St Helens CCG, St Helens MBC, St Helens & Knowles Hospitals NHS Trust, North West Boroughs Partnership NHSFT and Bridgewater Community NHSFT)
- ① Chair of integrated Resources Committee (CCG and Local Authority stakeholders) with responsibility for over £700m annual integrated S75 commissioning budgets.
- ① Digital and Performance lead.
- ① SRO for provider service changes – cancer, stroke, community, Mental Health, elective.

#### C&M ICS Level

Seconded to C&M ICS 3 days per week June 2021 to June 2022. Undertaking financial leadership and change management at the C&M level against the following domains:-

- Financial governance,
- Partner relationship management
- Transfer of functions to incoming ICS –CCG close down and ICS ROS)
- Principles & arrangements to manage System & place financial flows
- Ongoing leadership of the Finance Community (Commissioners and providers) to secure co-produced solutions

Member of C&M ICS Finance Advisory Reference Group, Member of IG working group, Member of Digital Groups – Clinical Information Advisory Group and Digital Design Authority.  
Chair of the C&M Independent Sector Operational Group and Member of the ERF finance working group.

#### Regional & National

Member of NW Independent Sector Regional Steering Group  
Board member of the National Casemix Office, Casemix Advisory Board  
Member of NHSE CFO Finance Working Group to 2019



### Key Achievements

- ① Delivered co-produced overall C&M provider and commissioner system financial balance for 21/22 including technical and delivery approach (
- ① Delivered medium term approach to secure elective IS capacity & delivery.
- ① Created a regime of tight financial management at organisational and St Helens system level; delivering to organisational level Control Totals.
- ① Improvements in organisation's annual oversight assessment from "inadequate" rating to "Good" over a 2yr time frame.
- ① Due diligence and financial redesign to recover inherited underlying £20m deficit at Place level.
- ① Assessment and Redesign of financial control environment at CCG level and improved process at Health economy level to promote sustainability.
- ① Focus shift to a due diligence approach for investments made with Local Authority partners.

### NHS KNOWSLEY CCG Dec 2016 to Jan 2018

#### Chief Finance Officer

Executive Board level director responsibility for Knowsley CCG and St Helens CCG. (Combined annual turnover in excess of £630m.) and CFO lead for shared financial services covering 3 CCGs. Corporate leadership of Finance, Performance, IM&T, Estates & Governance (SIRO). Lead executive with responsibility for finance enabling work streams across the Alliance Local Delivery System (LDS) of C&M STP. Financial lead into new models of care proposals across Knowsley and St Helens CCGs; Lead executive with oversight of Commissioning Support Service provision to the CCG. Lead commissioner for St Helens & Knowsley Hospitals Trust, North West Boroughs FT and Bridgewater Community FT.

Member of "Alliance" leadership Local Delivery System group and C&M Leadership Group. Member of advisory group to NHS England Director of Finance.

#### Key Achievements

- ① Delivered to 16/17 and 17/18 surplus financial plan for NHS Knowsley CCG.
- ① Promoted greater collaborative working across own CCGs and those in wider Alliance LDS, North Mersey LDS and C&M STP.
- ① Negotiated "Acting As One" principles in North Mersey LDS with main providers.
- ① Chair and led the "Alliance DoF group" of Mid Mersey CCGs and Providers

### NHS NORTH STAFFORDSHIRE & NHS STOKE ON TRENT CLINICAL COMMISSIONING GROUPS – June 2015 to November 2016

#### Chief Finance Officer

Executive Board level director with overall responsibility for 2 CCGs (combined annual turnover in excess of £660m.) Corporate leadership of Finance, Workforce, IM&T, Estates & Governance (SIRO). Lead executive with responsibility for enabling works streams of estates and IM&T across the whole of the Staffordshire County. Financial SRO for Cancer and End of Life Care in Staffordshire within context of new models of care (National Pioneer CCG status); Lead executive SRO with oversight of Commissioning Support Service provision to the CCG and tendering for all Staffordshire CSU support through the Lead Provider Framework. Lead commissioner for University Hospital North Midlands and key role in health economy financial realignment within context of pan Staffordshire Transformation Programme.

Member of Staffordshire Clinical Congress, Systems Resilience Group and NHS FD responsibility for the Primary Care Research facility at Keele University (1 of 3 national research arms). Member of advisory group to NHS England Director of Finance.



### Key Achievements

- ① Advising on 15/16 financial strategy in advance of commencing in post to stabilise the CCGs.
- ① Promoted greater collaborative working across own CCGs and those in wider Staffordshire
- ① Negotiated new service models to deliver QIPP requirements with main providers.
- ① Focus shift to a due diligence approach for investments made to Local Authority partners.
- ① Assessment and Redesign of financial control environment at CCG level and improved process at Health economy level to promote sustainability.
- ① Lead the development of Strategic Estates Plan for Staffordshire and initiated development of Digital Health Strategy across Staffordshire

### FLYDE & WYRE CLINICAL COMMISSIONING GROUP – Nov 2012 to May 2015

#### Chief Finance Officer

Board level director with responsibility for Finance, Workforce, IM&T, Estates, Governance (SIRO). Lead executive with responsibility for Enhanced Primary Care within context of new models of care (National - Integrated Care Pioneer CCG and Vanguard); lead executive for Fleetwood neighbourhood and multi- specialty provision in the area. Lead executive with oversight of Commissioning Support Service provision to the CCG. Member of Lancashire Leadership forum, Healthier Lancashire programme, Regional Emerging Leaders Steering Group, Lancaster Digital Health forum. NHSCB Financial Expert on authorisation of CCGs

#### Key Achievements

- ① Delivery of a fully authorised Wave 2 CCG – authorised without conditions – Jan 2013 and subsequently recognised as “excellent” in 2015.
- ① Successful negotiation of allocation changes in Y1 relating to Specialised Services, practice changes, estates and Public Health transfer to local authority through a due diligence approach.
- ① Excellent track record of delivery against key targets for the CCG e.g., financial and constitutional targets. Delivered financial sustainability against 5yr plans.
- ① Supported the initial creation and subsequent development of the Lancashire CSU; including local negotiation of support infrastructure to the CCG.
- ① Formation of a health economy approach in the Fylde Coast considering financial sustainability, integrated commissioning and service reconfiguration leading to current position as nationally recognised Integrated Care Pioneer.
- ① Leveraging resources to deliver population health outcomes and targeting health inequalities

### NORTH OF ENGLAND SPECIALIST COMMISSIONING GROUP – July 2012 to Nov 2012

#### Secondment to North West Office

Ensuring the proper identification and transfer of over £1.7bn of nationally prescribed specialised services in the North West to the NHS Commissioning Board. Ensuring the effective transition of specialised commissioning responsibility from PCTs, CCGs, SCGs and National Specialised Services functions to the NHSCB Local Area Team.

Financial leadership of the Finance, Performance & Contracting functions through the transition to NHS England.



## NHS BURY – October 2009 to July 2012

### Director – Financial Turnaround [Feb 11 – July 12]

Leadership of NHS Bury locality Turnaround Programme and responsibility for the Bury Programme Management Office function - planning, supporting, reporting and delivery of financial turnaround at NHS Bury across all areas of the PCTs c£300m business. Collaborative challenge to Pennine Acute Trust recovery actions in North East Sector of GM. Delivery of recurrent financial surplus in advance of the 2012/13 financial year and the recovery of an opening £25m deficit position.

Leadership through transition for the 2012/13 clinical business developments of NHS Heywood, Middleton & Rochdale.

### Director of Finance & Deputy CEO of Community Services Bury (Arms Length Provider Organisation) [Oct 09 – Mar 11]

Responsible officer to the Board and its sub committees in the capacity of Director of Finance and Performance to Community Services

An executive director with responsibility for the operational management of 36 clinical services to children and adults delivered within the context of both planned and urgent care delivery systems. Comprising c. 675 staff (headcount) and a budgeted turnover of c£27m

#### Key Achievements

- ① Developed the financial and commercial strategy of the organisation:- e.g. 5 yr. Cost Improvement Programme; strategic alliances with other providers; formalised approach to contracting & commissioning
- ① Development of Out of Hospital services within the community and the introduction of a new service model for urgent care in Bury.
- ① Developed the bid submission to DH and tripartite financial case for establishing a Community Services Foundation Trust organisation.
- ① Identification of the successor receiving organisation for community services in Bury and ensuring the professional transfer of services through the process of commercial due diligence.

## 5 BOROUGH PARTNERSHIP NHS FT – April 2004 to Sept 2009

### Foundation Trust Project Director [9mths]

Developed the Trust's state of readiness and preparations for application to become an NHS Foundation Trust.

#### Key Achievements

Led and managed the Trust response to the NHS Northwest gateway review of FT readiness prior to submission onto the Department of Health Applications Committee and Monitor.

### Executive Director of Finance [19 mths]

- ① Professional leadership and development of the finance, informatics and performance functions to promote improvement for excellence.
- ① Wider role as Trust Board member and member of Executive Management Team.
- ① Promoted strong corporate governance through an integrated assurance approach and the development of a performance management culture.
- ① Ensuring the financial viability and sustainability of the Trust using a fit for purpose Finance function developed to meet the organisational needs of the Trust and its wider environment



## Key Achievements

- ① Delivery of all key financial duties and achievements to plans and targets.
- ① Turnaround of £5.2m recurrent deficit position in 2005/06 to recurrent surplus by 06/07.
- ① Executive lead in the development of proposal to re-engineer 50% of the business from an inpatient focus to an emphasis on community-based services. Leading this new corporate model of care vision for the Trust from inception to introduction.
- ① Established and led a cultural shift at the Trust through engagement to embed a culture of cost consciousness and financial awareness to ensure good financial governance.
- ① Restructured the Finance Department to support the wider organisational management needs and requirements.
- ① Added value to the wider financial management aspects of the SHA by collaborative working in various Health Economy settings.
- ① Commissioned the first Service Development Strategy for the Trust and acted as Executive sponsor in its development.

## Deputy Director of Finance, Performance & Informatics [3yrs 2 mths]

Responsibility to organise and manage all the financial, performance and IM&T functions within the Trust; developing and monitoring systems to ensure that they met organisational objectives and statutory requirements. Direct line management of 63 staff.

Successfully represented and led the Trust response on areas such as Use of Resources assessments, contract negotiations, SHA performance reviews, Health Economy Recovery planning, emergency planning, financial planning, McKinsey FT assessment, service transfers and adopting best practice from national and international visits to health economies.

## Consultancy/Interim Work – June 2001 to March 2004

Provision of interim management and consultancy services to 5 Boroughs Partnership NHS Trust, Lichfield District Council, Transport for London and Bolton MBC

## Achievements

Turnaround Director for Operational Services at **Lichfield District Council**. Achieved in 9mths;

- ① A full review of Waste Management and Recycling in the Borough to identify options for efficiency savings and generation of additional income so that the directorate recovered its in-year and recurrent financial viability.
- ① An organisational development scoping exercise to identify performance limiting factors and development of future work plans covering both operational and project working resulting in greater resource utilisation and generation of cost savings.
- ① Advised on business case submissions and secured significant resources from central government bodies (DEFRA) and through partnering arrangements.

Consulting services to **Transport for London** over the 12 months July 01 to July 02 – achieved;

- ① Project turnaround for a £30m technical project. Within 12mths achieved an 80% increase in end product delivery against an opening target baseline.
- ① Full analysis & review of business activities, project strategies, controls, data management and end to end delivery processes within a business directorate. Developed strategies to remedy identified deficiencies/enhance performance.
- ① Client managed organisational design consultants leading to a restructure of a strategic business unit.
- ① Contributed in a client capacity to further consultant led exercises on Action Planning and Organisational Design work for a second Strategic Business Unit.





## **NORTH & WEST GREATER MANCHESTER COURTS SERVICE – NOV 1996 to June 2001**

### **Director of Financial Services and Performance Management**

Executive Board Member & Deputy to the Chief Executive - direct corporate responsibility for Financial, Information Technology, Estates, Procurement and Performance Management affairs

Key achievements in taking an organisation from inception and:

- ① developing the financial infrastructure necessary for effective stewardship and control including “fit for business” targets, systems and teams.
- ① developing and leading strategies for finance, property, ICT and operational services
- ① creating a performance-based management regime which was highly geared towards achievement, performance excellence and continuous appraisal.

## **VARIOUS POSITIONS WITHIN THE PUBLIC SECTOR – July 1983 to Nov 1996**

Jul 95 - Nov 96 GREATER MANCHESTER FIRE AUTHORITY  
Business Accountant

Jul 92 - Jul 95 LANCASHIRE COUNTY COUNCIL  
Senior Accountant (Systems Development)

Jul 90 - Jul 92 WIGAN HEALTH AUTHORITY  
Management Accountant

Jul 83 - Jul 90 WIGAN METROPOLITAN BOROUGH COUNCIL  
Assistant Accountant, Treasurer's Department  
Clerical Assistant, Education Department

### **GREATER MANCHESTER FIRE & CIVIL DEFENCE AUTHORITY**

Business Accountant

Provision of advice and assistance on Standard Spending Assessment (SSA) matters to members and officers

Provision of financial advice and assistance on Compulsory Competitive Tendering (CCT) matters to members and officers

Construction of in-house tender bids

Setting up financial and management information systems and processes across the authority

The provision of financial advice and assistance to managers from non-financial disciplines

Derivation of business plans, modelling, income generation forecasts, etc.

Chairing cross functional groups responsible for establishing Business Units

Representation at Working Parties, Committees and Project Management Groups

Review of financial procedures and systems, including liaison with internal and external audit

Completion of statistics and returns

Annual review and Direct Service Organisation Performance

Budget preparation, analysis, monitoring and review

### **LANCASHIRE COUNTY COUNCIL**

Senior Accountant (Systems Development)

IT and business consultancy role

Identification of areas requiring specialised systems based experience, reviewing business processes and developing practical solutions, eg design and provision of Executive Information System for County Treasurer

Strategic planning and development of networked computer systems within the Financial





Management Services (FMS) group of the County Treasurer's Department, eg project managed the introduction of Microsoft Office suite and Windows applications to develop the service delivery capabilities of the FMS group  
Training and development of finance staff in the realms of Information Technology and the linkages to business innovation.  
Development and maintenance of corporate IT based systems in partnership with service users and other professions  
Responsibility for planning, allocating and reviewing the work of subordinates  
Management role within the Systems Development Section and on the Senior Management Group within Financial Management Services

## WIGAN HEALTH AUTHORITY

Management Accountant

Strategic and operational review of Wigan Health Authority's patient care costs by medical specialty for local, regional and national change initiatives - Internal market development  
Developed Patient Care Contracts and service marketing aspects  
Oversaw the Regional to local transfer of Senior Medical Staff budgets and the subsequent costing and regular monitoring  
Provision of financial management advice to Clinical Business Groups - A&E, ENT, Obs & Gynae, Surgical  
Proactive management in educating Non-Financial Managers in the realms of the contractual/competitive nature of Health Service reforms  
Servicing of District Medical Audit Committee responsible for clinical performance audits  
Staff management  
Developed pricing structure for specific medical procedure