

## Position Description

Employment Agreement:	Individual Employment Agreement
Position Title:	<b>Service Planning Manager (12 month fixed-term)</b>
Service & Directorate:	Planning & Funding
Location:	Dunedin (but district relationships and travel is required)
Reports to:	Planning & Accountability Manager
DHB Delegation Level:	N/A
Number of direct reports:	NIL
Date:	April 2022

### Our Vision

Better Health, Better Lives, Whānau Ora

### Our Mission

We work in partnership with people and communities to achieve their optimum health and wellbeing  
We seek excellence through a culture of learning, enquiry, service and caring

### Our Shared Values and Behaviours

Kind <i>Manaakitanga</i>	Open <i>Pono</i>	Positive <i>Whaiwhakaaro</i>	Community <i>Whanaungatanga</i>
<b>Looking after our people:</b> We respect and support each other. Our hospitality and kindness foster better care.	<b>Being sincere:</b> We listen, hear and communicate openly and honestly. We treat people how they would like to be treated.	<b>Best action:</b> We are thoughtful, bring a positive attitude and are always looking to do things better.	<b>As family:</b> We are genuine, nurture and maintain relationships to promote and build on all the strengths in our community.

### Our statutory purpose

To improve, promote and protect the health of our population

- Promote the integration of health services across primary and secondary care services
- Seek the optimum arrangement for the most effective and efficient delivery of health services
- Promote effective care or support for those in need of personal health or disability support services
- Promote the inclusion and participation in society and the independence of people with disabilities
- Reduce health disparities by improving health outcomes for Māori and other population groups
- Foster community participation in health improvement and in planning for the provision of and changes to the provision of services
- Uphold the ethical and quality standards expected of use and to exhibit a sense of social and environmental responsibility

## PURPOSE OF ROLE

To lead and manage the process for development of service plans and annual planning (at service and senior management levels) for the delivery of health services in the hospital and the community. This includes leading planning activities by providing structure and process; supporting specific services in the development of their plans; assessment and liaising with services regarding the alignment with wider planning priorities; stakeholder engagement at executive, senior management and service management levels; and providing advice and coaching to staff on the planning approach, planning activities, and monitoring.

In this role an understanding of the layers of different strategic planning and policy environments is critical to ensure alignment of service planning and annual planning activities with localities, and annual, regional, and national planning. In parallel, your commitment to application of Te Tiriti o Waitangi and developing an equitable health system that achieves positive outcomes for all, will mean championing practice changes to improve Māori Health.

As a natural relationship builder, you will be comfortable actively engaging with the clinical and non-clinical service leaders, Directorates, Finance, Information Systems, and Planning and Funding.

As well as leading the planning cycle, the use of data and intelligence to bring “evidence” to planning activities is central to the role. While stakeholders will support generation of epidemiological and system performance data, you will need to develop a high-level understanding of different data sources that services use for planning and monitoring outputs and outcomes, to synthesise and communicate findings that are relevant for planning.

Experience in health would be an advantage but is not essential. Orientation to the health system will be provided for the incumbent to support getting up to speed if required.

This role reflects a unique opportunity for broad scope exposure to our Southern health system, the different local, regional and national planning priorities, and the scope of work underway to improve service delivery.

**Note:** This role is supported by a Service Planning Advisor position. While both this Service Planning Manager and the Advisor roles report to the Planning & Accountability Manager, the Service Planning Manager will be expected to provide operational structure and guidance to the Advisor.

## Competencies

The following competencies apply to this position. The employee will be assessed against these as part of their annual performance and development review.

### Organisational Competencies

<b>Customer Focus</b>	Is dedicated to meeting the expectations and requirements of internal and external customers; gets firsthand customer information and uses it for improvements in products and services; acts with customers in mind; establishes and maintains effective relationships with customers and gains their trust and respect
<b>Integrity and Trust</b>	Is widely trusted; is seen as a direct, truthful individual; can present the unvarnished truth in an appropriate and helpful manner; keeps confidences; admits mistakes; doesn't misrepresent him/herself for personal gain.
<b>Drive For Results</b>	Can be counted on to exceed goals successfully; Is constantly and consistently one of the top performers; very bottom line oriented; steadfastly pushes self and others for results.

### Management Competencies

<b>Interpersonal Savvy</b>	Relates well to all kinds of people—up, down, and sideways, inside and outside the organization; builds appropriate rapport; builds constructive and effective relationships; uses diplomacy and tact; can defuse even high-tension situations comfortably.
<b>Motivating others</b>	Relates well to all kinds of people. Builds appropriate rapport, and constructive effective relationships. Encourages performance, and builds energy and enthusiasm for collective outputs.
<b>Process Management</b>	Good at figuring out the process necessary to get things done; knows how to organize people and activities; understands how to separate and combine tasks into efficient work flow; knows

	what to measure and how to measure it; can see opportunities for synergy and integration where others can't; can simplify complex processes; gets more out of fewer resources.
<b>Problem Solving</b>	Can effectively cope with change; can shift gears comfortably; can decide and act without having the total picture; isn't upset when things are up in the air; doesn't have to finish things before moving on; can comfortably handle risk and uncertainty; able to identify patterns and opportunities from seemingly disparate issues.
<b>Planning</b>	Accurately scopes out length and difficulty of task and projects; sets objectives and goals; breaks down work into the process steps; develops schedules and task/people assignments; anticipates and adjusts for problems and roadblocks; measures performance against goals, evaluates results.

<b>KEY RELATIONSHIPS</b>	
<b>Within Southern DHB</b>	<b>External to Southern DHB</b>
• Executive Leadership Team	• Similar roles in other DHBs
• Provider Arm GMs and Service Managers	• Ministry of Health
• Directors of Nursing	• South Island Alliance
• Directors of Allied, Scientific and Technical	• WellSouth PHO
• Māori Health Directorate and Leadership	• Primary care providers
• Portfolio Managers	• External Providers
• Service Managers and Charge Nurse/Unit Managers	
• Digital Reporting Team	
• Medical Directors	
• Planned Care Manager	
• Funder Manager	
• Quality Improvement Advisors	
• Business Analysts	

## **PERSON SPECIFICATION**

The expertise required for a person to be fully competent in the role. Position specific competencies:

	<b>ESSENTIAL</b>	<b>DESIRABLE</b>
<b>Education and Qualifications (or equivalent level of learning)</b>	<ul style="list-style-type: none"> <li>Bachelor's Degree in a relevant field (Health, Planning, Management, Indigenous Studies etc)</li> </ul>	<ul style="list-style-type: none"> <li>Master's degree in relevant field</li> <li>Industry qualification in project management or planning</li> </ul>
<b>Experience</b>	<ul style="list-style-type: none"> <li>Experience in Senior Planning roles or equivalent demonstrable skills</li> <li>Health, Government or Social Sector Experience</li> <li>Experience Building relationships and working alongside multiple stakeholders to achieve project outcomes</li> <li>Ability to manage and lead multiple projects and to work to strict deadlines</li> </ul>	<ul style="list-style-type: none"> <li>Policy, Project or Quality Improvement Experience</li> <li>At least 10 years' experience in the health and disability support services OR equivalent planning roles in another sector</li> <li>Demonstrated capability and experience in relationship management in the health sector</li> <li>Familiarity with Te Ao Māori or kaupapa Māori principles as they apply to health service planning and design</li> </ul>
<b>Knowledge and Skills</b>	<ul style="list-style-type: none"> <li>Ability to form structure in complex operating environments</li> <li>Knowledge of planning cycles and methodologies</li> </ul>	<ul style="list-style-type: none"> <li>Familiarity with project management techniques</li> <li>Experience in the planning or contractual processes of government services</li> </ul>

	<ul style="list-style-type: none"> <li>• Commitment to development cultural competencies</li> <li>• Advanced computer skills – word processing, excel</li> <li>• An effective communicator and relationship builder, able to encourage development when other stakeholders have competing priorities</li> </ul>	<ul style="list-style-type: none"> <li>• Knowledge and experience of clinical and process activities within a hospital or health setting</li> <li>• A working knowledge and commitment to quality improvement – Lean methodology</li> </ul>
<b>Personal Qualities</b>	<ul style="list-style-type: none"> <li>• Ability to see the “big picture” in national and regional planning while also connecting local actions to this</li> <li>• An effective facilitator and relationship builder</li> <li>• Accuracy and diligence with their work outputs</li> <li>• A team player and effective communicator, both verbally and written</li> <li>• Proactively manage their time and responsibilities and achieve them independently.</li> <li>• Have a sense of ownership and effectively do what required to achieve the best outcome</li> <li>• Actively develop organizational relationships with various departments and colleagues to work collaboratively</li> </ul>	

**KEY RESULT AREAS:**

<b>Key Accountabilities:</b>	<b>Example of successful delivery of duties and responsibilities</b>
<b>Leading and Managing the Planning Cycle</b>	
<ul style="list-style-type: none"> <li>• Provision of structure to the Service Planning and Annual Planning process</li> <li>• Simplification of planning cycle as appropriate</li> <li>• Leading the planning cycle and communication with managers</li> <li>• Monitoring of performance and reporting of status to key stakeholders</li> <li>• Planning priorities are aligned to wide frameworks</li> <li>• Provide guidance and direction to the Planning Advisor role</li> </ul>	<ul style="list-style-type: none"> <li>• Planning cycles are completed on time</li> <li>• Organisational understanding of planning priorities, reporting, and service and annual planning is improved</li> <li>• Service-level planning priorities are easily assessed in the context of local and national priorities</li> </ul>
<b>Development of Provider Arm Planning Documents</b>	
<ul style="list-style-type: none"> <li>• Support Directorate Senior Leadership Team and Directorate staff with production and monitoring of their service and directorate plans</li> <li>• Provide advice and support on alignment of service and annual planning with strategic and management objectives</li> <li>• Work with sub-speciality departments on planning activities</li> <li>• Provide guidance direction and delegation to the Planning Advisor on required development tasks</li> <li>• Ensures provider planning priorities are aligned with locality developments and progress</li> </ul>	<ul style="list-style-type: none"> <li>• Support the process for development of annual Directorate Plans and Provider Arm Patient Services Plan.</li> <li>• Effective relationships with services established</li> <li>• Provide advice, demonstrating knowledge and application of health strategies at a national, regional and local level</li> <li>• Effective facilitation of meetings as required</li> </ul>
<b>Monitoring and Reporting</b>	
<ul style="list-style-type: none"> <li>• Provide frameworks for Directorate staff to monitor and report effectively on their service and directorate plans</li> <li>• Prepare high level reports on a quarterly basis</li> <li>• Provide updates of status of service and annual planning across services</li> </ul>	<ul style="list-style-type: none"> <li>• Stakeholders have clear understanding of progress and state of planning cycle</li> <li>• Discuss delays (and remedies) in Directorate Plan milestones with Directorates, so that changes as needed can be implemented</li> <li>• Patient Services Plan Quarterly report prepared on time</li> </ul>

<ul style="list-style-type: none"> <li>• Provide support and advice in the development and use of appropriate data and reports to monitor output and outcomes</li> </ul>	
<b>Management of relationships with key stakeholders</b>	
<ul style="list-style-type: none"> <li>• Executive and Senior Management stakeholders are kept well informed about service planning activities</li> <li>• Support Directorate Senior Leadership Team and Directorate staff with service and annual planning</li> <li>• Support consultation and consolidation of Directorate Plans and Provider Arm Patient Service Plan</li> <li>• Develop and maintain effective working relationships with Planning and Funding in respect of service and annual planning</li> <li>• Develop and maintain effective working relationships with Finance and Business Analysts in respect of service and annual planning and reporting</li> </ul>	<ul style="list-style-type: none"> <li>• Service planning and Annual Planning processes are updated (and changes communicated) in line with stakeholder feedback</li> <li>• Professional relationships are effective and positive</li> </ul>
<b>Actively contribute to supporting the wider Planning &amp; Funding team</b>	
<ul style="list-style-type: none"> <li>• Maintain awareness of the team's workplan/activity</li> <li>• Work as a member of the wider team by actively supporting and contributing to the overall workplan as required</li> </ul>	<ul style="list-style-type: none"> <li>• Attends regular team meetings</li> <li>• Works within projects for the wider team as required</li> </ul>
<b>Living Southern DHB Values</b>	
Proactively demonstrating Southern DHB values in all aspects of the role.	<ul style="list-style-type: none"> <li>• Demonstrates behaviours that we want to see from each other, at our best.</li> <li>• Contributes positively to a culture of appreciation, a learning culture, where people feel safe to speak up.</li> <li>• Contributes positively to team and other initiatives that seek to improve patient and whanau experiences and/or staffs experience of working.</li> </ul>
<b>Other Duties</b>	
Undertaking duties from time to time that may be in addition to those outlined above but which fall within your capabilities and experience.	<ul style="list-style-type: none"> <li>• You respond positively to requests for assistance in own and other areas, demonstrating adaptability and willingness.</li> <li>• You produce work that complies with SDHB processes and reflects best practice.</li> <li>• Research undertaken is robust and well considered.</li> </ul>
<b>Professional Development – self</b>	
Identifying areas for personal and professional development.	<ul style="list-style-type: none"> <li>• Training and development goals are identified/agreed with your manager.</li> <li>• Performance objectives reviewed annual with your manager.</li> <li>• You actively seek feedback and accept constructive criticism.</li> </ul>
<b>Health, Safety and Wellbeing</b>	
Taking all practicable steps to ensure personal safety and the safety of others while at work, in accordance with the Southern DHB's Health, Safety and Wellbeing policies, procedures and systems.	<ul style="list-style-type: none"> <li>• You understand and consistently meet your obligations under Southern DHB's Health and Safety policy/procedures.</li> <li>• You actively encourage and challenge your peers to work in a safe manner.</li> <li>• Effort is made to strive for best practice in Health and Safety at all times.</li> </ul>
<b>Treaty of Waitangi</b>	
Giving effect to the principles of the Treaty of Waitangi – Partnership, Participation and Protection through your interaction with others on a day to day basis.	<ul style="list-style-type: none"> <li>• <i>Partnership</i> – You interact in good faith and in the nature of a partnership. There is a sense of shared</li> </ul>

	<p>enterprise and mutual benefit where each partner takes account of the needs and interests of the other.</p> <ul style="list-style-type: none"> <li>• <i>Participation</i> – You work in partnership with our treaty partners to enable our organisation to prosper. You are mindful of the varying socio-economic conditions that face our people and work hard to remove barriers of access to health and education.</li> <li>• <i>Protection</i> – You work proactively to protect the rights and interests of Māori, including the need to proactively build the capacity and capability of Māori.</li> </ul>
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Note: the above example measures are provided as a guide only. The precise performance measures for this position will require further discussion between the job holder and manager.

**For Job Evaluation Purposes:** (As per the current Southern DHB Delegation of Authority Policy)

Number of direct reports: : NIL  
 Southern DHB Delegation of authority (level 1 – 5) : N/A

**Staff Authority**

Authority to engage, promote, discipline and dismiss staff

No authority

**Contractual Authority**

Authority to enter into agreements or contracts on behalf of the Southern DHB

- Limited: No
- Long term \$1.5 to \$3 million No
- Long term in excess \$3 to \$7.5 million No

**Work Complexity**

**Most challenging duties typically undertaken or most complex problems solved:**

*Examples:*

- *Engages with Senior and Executive Management on Planning Cycle, priorities, and reporting*
- *Updating and designing planning cycle materials and templates based on stakeholder feedback; communicating these*
- *Understands the strategic planning environment of the health system including national, regional and local priorities – and identifies connections between services and opportunities for synergies.*
- *Assessing the strategic alignment of proposed operational planning activities*
- *Facilitating and supporting services to develop their plans – including guidance on the planning environment above*
- *Coordinating the annual planning cycle and reporting on delivery*

**Freedom To Act**

*Must understand planning environment sufficiently to act autonomously to engage with service leads, clinical staff, general managers and directors with low line manager oversight. Establishes and leads planning cycle*

**Financial Responsibilities**

- Controls a budget No

- Maximum that may be spent without reference to manager N/A
- Jobholder can spend unbudgeted capital. N/A
- Jobholder is responsible for committing the organisation to long-term contracts No
- Jobholder signs correspondence for Company No

## CHANGES TO POSITION DESCRIPTION

From time to time it may be necessary to consider changes to the position description in response to the changing nature of our work environment – including technological requirements or statutory changes. This Position Description may be reviewed as part of the preparation for your annual performance and development review.

Acknowledged / Accepted:

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Employee

.....  
Date

.....  
Manager

.....  
Date