

NHS Wales Awards 2026

Combined Finance and Performance Team Nominations

Information paper for the Finance and Performance Committee

Context and background

This paper brings together two Hywel Dda University Health Board finalist nominations for the NHS Wales Awards 2026. It is presented to the Finance and Performance Committee for information, to recognise the work undertaken by the Finance and Performance teams and to provide members with a consistent account of the aims, improvement approaches, outcomes, learning and next steps described in each nomination.

The Finance Team nomination, “Rebuilding Trust in Finance: A Cultural Change Journey with Lasting Impact for Hywel Dda Finance”, has been shortlisted in the NHS Wales Team Culture Award category. The Performance Team nomination, “Making data more accessible for data-led improvement: identifying and addressing hotspots at the earliest opportunity”, has been shortlisted in the NHS Wales Information Award category.

For consistency, both nominations are set out under the same headings used in the original Finance nomination. The Finance nomination appears first, followed by the Performance Team nomination.

Purpose

The Committee is asked to note the two finalist nominations and the improvement work, reported outcomes and learning described within them.

1. Finance Team nomination

Category

NHS Wales Awards 2026: NHS Wales Team Culture Award

Title/Summary

Rebuilding Trust in Finance: A Cultural Change Journey with Lasting Impact for Hywel Dda Finance

What was the aim of the improvement project?

Improve staff engagement and stakeholder satisfaction and turnover by 20% by March 2026, transforming finance into an innovative, insight-led partner.

How did you know an improvement was needed?

The improvement journey was prioritised in response to a building concern that the existing finance culture was limiting its own effectiveness and engagement.

Historically, the function was perceived as transactional and compliance-focused, with limited visibility of value-adding insights. Baseline feedback from internal stakeholder engagement and informal discussions highlighted inconsistent relationships with operational teams and low confidence in finance as a strategic partner. Staff survey results also indicated opportunities to improve engagement, with lower scores in areas such as involvement, communication and feeling valued, alongside turnover levels above organisational expectations.

Quantitatively, early internal pulse surveys and stakeholder feedback suggested satisfaction levels below desired benchmarks, with variation across teams. Qualitative evidence reinforced this, with recurring themes including limited accessibility of finance, insufficient forward-looking insight, and variable quality of business partnering.

The need for change was further driven by increasing financial pressures, the requirement for stronger financial grip and control, and the expectation, both locally and nationally, that finance should enable better decision-making and support service transformation.

This aligned to the Duty of Quality, particularly in:

- Culture and leadership, requiring compassionate, inclusive and high-performing teams.
- Timely and effective care, supported by better decision-making and use of resources.
- Learning and improvement, embedding continuous improvement and innovation.

Without a deliberate cultural shift, the finance function risked remaining reactive and undervalued. The programme was therefore essential to build an engaged workforce, improve stakeholder confidence, and position finance as an innovative, insight-led partner contributing to high-quality, sustainable services.

What did you decide to do and who did you involve?

A structured, improvement programme-level approach was taken, drawing on industry best-practice transformation work, improvement methodology and strong Workforce and Organisational Development support.

A formal governance structure was established to drive delivery, including Finance transformation development days, workstream leads aligned to key priority areas, and regular reporting into senior leadership forums, locally and nationally. This ensured clear accountability, pace and visible leadership of cultural change.

The programme adopted a recognised continuous improvement approach, using iterative cycles of engagement, testing and refinement. The diagnostic baseline and roadmap identified priority capabilities, including business partnering, insight and leadership behaviours, which were translated into targeted actions and measurable outcomes aligned to the “True North” ambition.

Workforce and Organisational Development were integral partners, co-designing and facilitating:

- Leadership development programmes focused on compassionate, values-led leadership.
- Team workshops to define expected behaviours and what good looks like.
- Coaching and structured engagement to embed change locally.

Finance staff contributed through workshops, pulse surveys and reflective sessions. Operational and clinical stakeholders were engaged through feedback sessions and business partnering forums, while regular open forums created safe spaces for honest dialogue and continuous feedback. This inclusive approach ensured the programme was co-created and owned by the workforce and stakeholders.

A key enabler was the strengthening of the apprenticeship pipeline and study support offer, providing clearer access to professional accountancy qualifications, protected development conversations and structured career support.

What changes did you test and what results did you get?

The programme embedded the Plan, Do, Check/Study, Act approach, informed by diagnostics and continuous staff and stakeholder feedback.

Plan: The baseline assessment highlighted inconsistent business partnering, limited insight, variable engagement and inconsistent approaches and processes. Measurable indicators were agreed using staff survey elements and turnover rates.

Do: Targeted changes included embedding finance staff within operational teams, co-designed leadership and behavioural development with Workforce and Organisational Development, and more forward-looking, insight-led reporting.

Check/Study: Impact was assessed through pulse surveys, stakeholder feedback and performance indicators. The nomination reports improved accessibility of finance, increased stakeholder confidence and positive movement in staff engagement, particularly communication, involvement and feeling valued. Enhanced reporting supported earlier identification of financial risks and more informed decision-making.

Act: Learning informed refinement and scaling. Pilots showed that role clarity and behavioural expectations were as important as proximity, leading to stronger definition of business partnering roles. Leadership interventions showed the importance of consistent behaviours, which were embedded into performance and development processes. Insight-led reporting was standardised following positive feedback.

Further practical developments included more actionable financial insight within reporting cycles and a deliberate apprenticeship and early-careers pipeline to support succession planning and future finance capability.

What was the outcome of all the changes you made?

The nomination reports a measurable and sustained shift in culture, capability and organisational impact, with benefits for staff and stakeholders.

For staff, surveys and pulse checks showed positive movement towards the 20% target in communication, involvement and feeling valued. Feedback described a more open, inclusive and psychologically safe culture. Turnover reduced in key teams and recruitment attraction improved.

For organisational stakeholders, qualitative feedback indicated that finance was increasingly seen as accessible, collaborative and value-adding, with greater demand for finance involvement in planning and decision-making.

For the organisation, the shift to an insight-led approach strengthened financial grip and control through earlier identification of risks, more robust forecasting and improved alignment between financial and operational plans.

For patients and service users, the nomination described an indirect benefit through better financial insight, collaboration and resource prioritisation in support of sustainable, timely and effective services.

Overall, the change repositioned finance as an innovative, insight-led partner, delivering cultural and organisational benefits.

What did you learn?

Sustainable culture change requires equal focus on leadership, behaviours, capability and structure, not only process redesign. Diagnostics, governance and partnership with Workforce and Organisational Development provided a clear framework, but change accelerated when it was co-created with staff and stakeholders.

Leadership visibility and consistency were critical. Embedding change through recruitment, appraisal and development was also essential to sustaining progress. The programme combined quantitative evidence, including survey scores, turnover and stakeholder feedback, with qualitative insight from pulse checks and open forums.

The nomination identified three areas that could have been stronger: clearer baseline metrics at an earlier stage, earlier stakeholder engagement to define expectations, and earlier investment in digital and analytical capability.

What will you do next?

The next phase will focus on embedding, scaling and spreading the cultural and capability improvements across four priority areas:

- Financial grip and control.
- Planning and forecasting capability.
- Business partnering.
- Digital and analytical capability.

Behaviours and expectations will continue to be integrated into recruitment, appraisal and leadership development. Learning is also being shared through regional Finance Operating Model discussions, creating opportunities to standardise effective practice and support wider collaboration across NHS Wales.

Why does your project deserve to win the category you have entered?

The nomination describes a sustained, evidence-based transformation in how a large corporate function fosters teamwork, collaboration and value. It addresses behaviours, leadership and relationships alongside process and capability, and reports improvements in staff engagement, turnover and stakeholder satisfaction.

The programme combines structured transformation, a clear “True North” ambition, Workforce and Organisational Development-led cultural development and continuous improvement methodology. Its impact extends to organisational decision support, resource allocation, risk identification and financial management. The model is intended to be transferable and scalable through regional and NHS Wales collaboration.

2. Performance Team nomination

Category

NHS Wales Awards 2026: NHS Wales Information Award

Title/Summary

Making data more accessible for data-led improvement: identifying and addressing hotspots at the earliest opportunity

What was the aim of the improvement project?

To create a single, trusted and accessible view of performance and safety information that enables teams to identify emerging hotspots earlier, manage risk proactively, strengthen accountability and improve outcomes.

How did you know an improvement was needed?

Post-pandemic performance pressures and Targeted Intervention highlighted the need for stronger and more proactive use of information. Staff had to access information from multiple systems, which reduced visibility and delayed decision-making.

The baseline position included long-open incidents and complaints, overdue risk actions and staff appraisal compliance below expected standards. Fragmented data and inconsistent visibility made it harder for teams and leaders to identify areas requiring attention and take timely action.

What did you decide to do and who did you involve?

The team standardised fragmented information using the finance cost-centre hierarchy, linking ward, team, directorate and Board-level views through a single organising structure.

The Our Performance and Our Safety dashboards were co-designed to bring together key information at staff's fingertips, including incidents, complaints, risks, appraisals, annual leave, sickness, core skills, procurement, finance, agency use and staffing levels.

The Executive Team escalation framework was embedded so that assurance levels, triggers and de-escalation actions were visible and applied consistently. Uptake was supported through open training, recorded sessions, bespoke team support and leadership and improvement programmes.

What changes did you test and what results did you get?

The work tested a progression from fragmented information to a single organising structure, accessible dashboards, a visible escalation framework and more focused action. User feedback, dashboard engagement data and trend monitoring were used to refine the content and identify data-quality issues.

The nomination poster reports the following measurable improvements:

- The average age of open incidents more than halved.
- Complaint resolution time more than halved.
- Overdue risk actions more than halved.
- Staff appraisal compliance improved from 68% to 81%.

What was the outcome of all the changes you made?

The dashboards created a single, trusted source of information across clinical care groups, corporate directorates, Executive Team and Board. Teams were better able to identify emerging hotspots earlier, focus conversations on what mattered and act with clearer accountability.

The programme strengthened organisational oversight and supported faster learning, more proactive risk management and better support for safe and effective care. The central outcome was a more accessible view of performance and safety that helped teams act earlier and manage risk more proactively.

What did you learn?

The principal learning was that data alone does not improve services. Improvement happens when insight is owned, discussed and acted upon. User feedback, dashboard engagement data and trend monitoring helped refine the content and highlighted data-quality issues.

The nomination also identified that earlier involvement of some teams and earlier data-quality assurance would have strengthened delivery further.

What will you do next?

The next phase will add further datasets, including audits and inspections, business continuity, staff survey and patient experience information. The team also plans to increase automation to reduce manual handling, strengthen data quality and provide faster insight.

The approach is considered scalable across NHS Wales because it uses widely available tools, standard governance and national datasets.

Why does your project deserve to win the category you have entered?

The project has turned information into improvement at scale by creating one trusted view of performance and safety. It brings fragmented information together, connects it to a consistent escalation framework and helps teams identify hotspots earlier, learn faster and take focused action.

The reported improvements in incident age, complaint resolution, overdue risk actions and appraisal compliance demonstrate practical organisational impact. The approach also has wider relevance because it uses accessible tools, common governance arrangements and datasets that can support learning and spread across NHS Wales.

Committee conclusion

The two nominations provide complementary examples of improvement. The Finance nomination focuses on culture, leadership, capability and the role of finance as an insight-led partner. The Performance nomination focuses on accessible information, consistent escalation and earlier action. Both demonstrate the importance of combining reliable evidence with clear ownership, collaboration and continuous learning.

The Finance and Performance Committee is asked to note the two finalist nominations and recognise the contribution of the teams involved.

Rebuilding Trust in Finance: A Cultural Change Journey with Lasting Impact for Hywel Dda Finance

NHS Wales Team Culture Award

Cultural change journey built with people, not done to people – creating a trusted and sustainable Finance team that helps others make better decisions.



Why change was needed

From Transactional to Trusted

Finance was viewed as transactional, compliance-focused and not always involved early in decision-making – a value focus change was needed.

Staff engagement and stakeholder confidence needed to improve. With increasing financial pressures, we recognised the need to transform our culture, strengthen relationships and become a valued strategic partner.

Co-creating a change culture

Change Built With People

A co-created programme across all staff within the function. By listening, learning and working together, we created lasting ownership of change.

Staff, leaders, Workforce and Organisational Development colleagues and stakeholders helped design the solution through workshops, surveys, open forums, coaching and leadership development.



Our 'True North'

A Shared Vision Guided by Ethics

Our ambition was simple:

- Improve staff engagement
- Improve stakeholder satisfaction
- Reduce turnover and improve job satisfaction
- Build a more inclusive and supportive culture
- Create an innovative, insight-led finance function

Together, we set out to make finance a trusted partner that helps improve services and outcomes.

Continuous improvement in action

Learn > Test > Improve > Repeat

Using the Plan–Do–Check–Act approach, we continuously tested and refined our new ways of working.

We embedded finance teams more closely with services, strengthened leadership behaviours, improved processes and developed more forward-looking, insightful reporting to support better decision making.



The difference we made



Staff Turnover
73% reduction
Improvement from 19% to 5%



Staff Survey
21% benefit
Satisfaction gain from 55% to 66%



Engagement Improvement
Co-creation of priority objectives



Insight Led Forward looking
Consistent service owned forecasts

What next and why it matters

Local Change to National Impact

This is not just a finance story. It shows how any service can rebuild trust, improve staff experience and support better decisions by combining culture, insight and continuous improvement.

Our approach is already being shared regionally, demonstrating how cultural change in corporate services can deliver lasting benefits for staff, organisations and patients.



Better Culture. Better Decisions. Better Outcomes.

Key learning: inclusive and compassionate leadership, co-created with staff and stakeholders, can transform culture and improve organisational value.



Making data more accessible for data-led improvement: identifying and addressing hotspots at the earliest opportunity

Information
award

A single, trusted view of performance and safety that helps teams act earlier, manage risk proactively and improve outcomes.



1

Fragmented data

Multiple systems and inconsistent visibility

2

Single organising structure

Finance cost-centre hierarchy links local to Board level

3

Our dashboards

Our Performance and Our Safety turn data into accessible insight

4

Escalation framework

Clear assurance levels, triggers and de-escalation actions

5

Focused action

Earlier intervention, stronger ownership and better outcomes

Context and challenge

- Post-pandemic performance pressures and Targeted Intervention highlighted the need for stronger, more proactive use of information.
- Staff had to access data from multiple systems, reducing visibility and delaying decisions.
- Baseline issues included long-open incidents and complaints, overdue risk actions and appraisal compliance below expected standards.

Approach and actions taken

- Standardised fragmented data using the finance cost-centre hierarchy, linking ward, team, directorate and Board views.
- Co-designed Our Performance and Our Safety dashboards, bringing together key data sources at staff's fingertips: incidents, complaints, risks, appraisals, annual leave, sickness, core skills, procurement, finance, agency use, staffing levels.
- Embedded the Executive Team escalation framework so assurance levels, triggers and de-escalation actions are visible and consistent.
- Supported uptake through open training, recorded sessions, bespoke team support and leadership/improvement programmes.

Impact and outcomes

- The dashboards created a single, trusted source of truth across clinical care groups, corporate directorates, Executive Team and Board.
- Teams can identify emerging hotspots earlier, focus conversations on what matters and act with clearer accountability.
- Programme has strengthened organisational oversight and supported faster learning, more proactive risk management and better support for safe, effective care.

Learning and key takeaways

- Data alone does not improve services: improvement happens when insight is owned, discussed and acted upon.
- User feedback, dashboard engagement data and trend monitoring refined content and highlighted data-quality issues.
- Earlier involvement of some teams and earlier data quality assurance would have strengthened delivery further.

Measurable improvements



More than halved

Average age of open incidents
Contributing to timelier learning and improvement.



More than halved

Overdue risk actions
Increasing assurance that risks are actively managed.



More than halved

Complaint resolution time
Supporting more responsive patient experience.



68% → 81%

Staff appraisal compliance
Improving the proportion of staff with recent appraisal.

What next and why it matters nationally

- Add further datasets including audits & inspections, business continuity, staff survey and patient experience.
- Increase automation to reduce manual handling, strengthen data quality and provide faster insight.
- The approach is scalable across NHS Wales because it uses widely available tools, standard governance and national datasets.

Key takeaway: This work has turned information into improvement at scale — creating one trusted view of performance and safety, helping teams act earlier, learn faster and improve care.

