

Director of Transformation, Planning & Performance

SCS Pay Band 2

Vacancy Reference: 2656770

Closing Date: 23:55 on Monday, 20 January 2025



HM Revenue
& Customs



Contents

- 3 [Introduction](#)
- 4 [Vision & Strategy](#)
- 5 [Why Join Us?](#)
- 6 [About the Role](#)
- 8 [Person Specification](#)

- 9 [Salary & Benefits](#)
- 11 [Application Process](#)
- 14 [FAQs](#)
- 17 [Contact Us](#)



Introduction to HMRC

HM Revenue and Customs (HMRC) is the UK's tax service. We're one of the largest organisations in the country, with more than 60,000 employees, and we collected £843.4 billion in tax revenue in 2023-24.

Our work touches the lives of almost everyone in the country. The tax revenue we generate is spent by government on the schools, NHS, police and other essential services we all rely on.

Our vision is to be a trusted, modern, tax and customs department – one that's here to support customers and works to close the tax gap. To achieve this, we are driving forward vital changes that will make us more efficient in serving our customers and managing their compliance.

The key to doing this is through better online services. By improving the digital experience for our customers, we aim to help many more to resolve their issues quickly and easily online, freeing us to help those who need extra support.

At the same time, we play a key role in supporting the smooth flow of trade at the border, making it easy for our importers and exporters to fulfil their customs obligations, which helps to deliver economic growth.

We can only achieve our purpose through the skill, dedication and professionalism of our people. We work in diverse, inclusive workplaces where everyone feels respected, can perform at their best and is able to achieve their full potential. We want HMRC to be a great place to work, and a place to do great work.

"I am delighted you are considering HMRC as a career choice.

HMRC is going through an exciting time as we undertake a major transformation to modernise our services for our customers.

We are delivering cutting-edge digital services, which will affect all our customers and colleagues.

We can only achieve this with the help and support of our people.

We offer challenging, interesting work and fulfilling, rewarding careers.

We value a diverse range of people and ensure that every colleague in HMRC works in a fully inclusive environment where they feel safe to speak up if they need to.

This is a key priority in HMRC and it's everyone's responsibility to contribute to it."

Jim Harra, Chief Executive and First Permanent Secretary



Our Vision & Strategy

Our vision is to be a trusted, modern tax and customs department – and our ten-year [Tax Administration Strategy](#) sets out some of the key reforms we're making to achieve this.

We're focused on delivering three key priorities:

Closing the tax gap

We're recruiting 5,000 more compliance officers over the next 5 years to help close the tax gap. We will reduce customer error by helping people get things right first time, and use our powers to tackle avoidance and evasion, ensuring everyone pays the tax that is due.

Improving day to day performance and the experience of our customers

We will improve our phone and post performance and support more customers to self-serve online or on the HMRC app where they are able – especially for simpler tasks. This will free up our advisers to help taxpayers who need extra support.

Modernising and reforming the tax and customs system

We're becoming a digital-first organisation, with a roadmap to be published in spring 2025 to digitalise more of the UK tax and customs system - such as our flagship Making Tax Digital programme - and to increase the resilience of our systems.

We're proud of the role we play in supporting businesses, employees and families in carrying out our vital purpose - collecting the money that pays for the UK's public services and giving financial support to people. We do this through the professionalism of our people, by living our values, and by treating our customers in line with the standards in [Our Charter](#).



Why join us?

HMRC Customer Services Group (CSG) employs around 22,000 colleagues leading customer service on behalf of the entire department so on a massive scale supporting individual and business taxes, and some benefits. Handling more than 50 million customer calls and answering around 15 million items of customer correspondence every year, CSG has a clear ambition to be a leading customer service organisation in the UK.

This is a key and high-profile leadership role within CSG, reporting directly to Myrtle Lloyd, Director General of CSG. It's an exciting opportunity, sitting on the CSG Board of Directors, playing a pivotal role in shaping the strategic direction of our business and supporting the day-to-day management of delivery during a transformational period. The CSG Board are focussed on improving the customer experience in order to drive channel shift, ensuring we meet and maintain our customer service targets and successfully transforming into a digital first organisation.

Our vision for Transformation, Planning and Performance (TP&P) is to harness industry best practice and technology and achieve transformation through a highly engaged team of planning, performance and finance experts, to step change customer experience in a world where we are increasingly challenged to reduce costs. TP&P will do this working in collaborative partnership with operations and other key support/ enabling teams.



“ During my 20-year Civil Service career, I've held a variety of leadership roles spanning strategy, programme/project delivery, operations and IT at the Department for Work and Pensions and Home Office. Before joining HM Revenue and Customs in February 2021 as Director General for Customer Services Group, I was the Chief Operating Officer at Her Majesty's Passport Office, as well as Registrar General for England and Wales. While at the Home Office I also lead the Operational Delivery Profession. Prior to my Civil Service career, I worked in the private sector in Asia, Middle East, the UK and North America. I'm passionate about inclusivity and am really pleased to see this being so core to HMRC's values, along with respect and fairness. ”

Myrtle Lloyd
Director General,
Customer Services Group

About the role

It is an exciting time to join CSG in this key role as it undertakes large scale transformation. Responsible and accountable for leading the planning and performance of CSG, overseeing a number of functions, including Finance, Operational Delivery and Transformation, Workforce Planning and Quality Assurance, ensuring they all work collaboratively together to deliver the business' key objectives. With great connections and relationships with both internal and external senior stakeholders, you will develop and implement strategies to maximise performance and drive transformation, whilst ensuring operational excellence and customer satisfaction.

Reporting to the Director General of CSG with a dotted line to HMRC's Chief Finance Officer, the Director of TP&P will lead a workforce of circa. 400 people, directly managing four Deputy Directors and will be equally comfortable working in transformation, workforce planning, performance or financial management.

Responsibilities & Duties

Strategic Leadership & Execution

- Setting the conditions for making CSG change for the better, linking into the wider HMRC strategy, finance and transformation work.
- Fully accountable for all elements of business performance, achieving required expectations by effectively driving strategic key actions, continually reviewing performance against targets and measures of success, and efficiently deploying all the resources needed.
- Collaboratively maps-out a comprehensive business plans that meets and/ or exceeds the strategic direction & objectives of the organisation.
- Leads the strategic planning process, identifying opportunities to maximise performance, trends and reducing operational threats.
- Uses data analytics to continually identify new areas of focus and monitors progress against key objectives and success measures, taking swift corrective action where needed to keep on course.
- Identifies and drives the adoption of new digital technologies to improve efficiencies and economies throughout operational delivery and across the organisation, including providing the right framework, KPIs and metrics to challenge and hold Operations Management to account.
- Ensures that the overall organisational goals and plans are aligned to the current and future operational needs of the business at Group level, while collaborating closely with senior executives.
- Directs the development of operational policies, procedures, and quality standards that support the sound delivery & implementation across all operational business areas and programmes.
- Represents the Director General in various boards and meetings with Ministers, building & maintaining strong and mutually beneficial partnerships with various stakeholders.

About the role (continued)

Business Delivery, Finance & Compliance

- Drives financial performance by managing budgets, and optimising resource allocation to achieve the business' revenue and business plans.
- Monitors financial measures and implements corrective measures as needed to ensure targets are met or exceeded.
- Reviews the overall progress of the business plans and exhausts all efforts to provide well-thought-of solutions to manage any risks or opportunities.
- Proactively identifies and drives opportunities to maximise efficiency of resources, tackling areas of underperformance swiftly with definitive and effective actions.
- Identifies and mitigates business risks, regulatory changes, and operational challenges.
- Works collaboratively with Risk teams to develop and implement robust, effective risk management strategies to safeguard CSG' reputation.

Stakeholder Engagement

- Cultivates strong relationships with key stakeholders, including customers, Ministers, other government departments and across HMRC.
- Supporting and challenging change propositions, working closely with Directors to ensure CSG and HMRC are able to invest with confidence and secure benefits and efficiencies, working in line with HMT guidance.

- Leverages network to create opportunities for growth and development across the business, as well as helping to solve challenges.
- Owning liaison with National Audit Office, Internal Audit and other external scrutiny bodies on behalf of the Director General, ensuring any recommendations are acted upon.

Engaged & Enabled People

- Serves as a strong figure-head who inspires the organisation to maintain a positive and well-functioning work-environment that highly motivates teams to achieve and maintain outstanding customer experiences.
- Builds and leads a high-performing team, fostering a culture of collaboration, innovation and accountability.
- Ensures coaching, mentorship and professional development opportunities are available to employees to enhance team members' skills and capabilities.
- Leads by example and consistently demonstrates the HMRC values of Professionalism, Integrity, Commitment, Innovation and Respect in every interaction throughout the organisation, to be an excellent leader who makes a positive difference in people's working lives.
- Empowers the operational and support teams with the leadership and resources they need to successfully achieve their departmental objectives.

Person specification

This is a pivotal leadership role within HMRC's Customer Services Group, unique in size and scale employing around 22,000 people, handling over 50 million customer calls and answering around 15 million items of customer correspondence every year. Demanding a strategic thinker with exceptional financial acumen, the successful candidate will oversee a diverse portfolio of functions, driving operational excellence and ensuring the organisation's financial health and strategic direction. They will work closely with senior stakeholders, both internally and externally, to deliver impactful results and shape the future of HMRC.

The successful applicant will need to demonstrate relevant experience and effective delivery of the following **Essential Criteria**:

- Proven track record at senior or executive leadership level in operational planning, resourcing, delivering effective outcomes and enhancing organisational performance. This should be in a large (both scale and scope) and complex organisation (i.e. in a high-volume transaction business, contact centre, customer services or an environment with a strong customer focus) and have included financial management.
- Demonstrable experience of transforming and driving change in service operations, both in terms of system adoption and behavioural change.
- Strong business delivery acumen, numeracy and financial literacy (including financial management at a senior level) and data-driven decision making. Proven ability to lead and implement strategic business solutions, analyse complex data, and make informed decisions to achieve organisational goals.
- Excellent leadership and interpersonal skills, with the ability to inspire and motivate cross-functional teams.
- Exceptional communication and negotiation abilities, with a demonstrated aptitude for building and maintaining relationships with stakeholders at all levels.
- Strategic thinker with a results-oriented mindset and a passion for driving continuous improvement and innovation.
- Professional qualification in finance, statistics or operational research, or equivalent experience.

Salary and benefits

Salary:

Up to £130,000 depending on experience

The appointee may also be considered for end of year and in year non-consolidated performance bonuses subject to individual performance.

Please note: Standard Civil Service pay rules apply for existing civil servants.

Locations:

East Kilbride / Glasgow, Edinburgh, Leeds, Liverpool, Manchester, Newcastle or Nottingham.

Travel to other locations will be required.

Please note: All SCS2 and above are expected to come into the office more than 60% of the working week.

Benefits:

We take your career and development seriously and want to enable you to build a successful career with the department and wider Civil Service.

It is crucial that our employees have the right skills to develop their careers and meet the challenges ahead, and you'll benefit from regular performance and development reviews to ensure this development is ongoing.

As a Civil Service employee, you'll be entitled to a large range of benefits.

This includes:

- 25 days annual leave on entry, increasing on a sliding scale to 30 days after 5 years' service. This is in addition to your public holidays.
- This will be complemented by one further day paid privilege entitlement to mark the King's Birthday.
- Interest-free loans allowing you to spread the cost of an annual travel season ticket or a new bicycle.
- Flexible working patterns and access to Flexible Working Schemes allowing you to vary your working day provided you work your total hours.
- A competitive contributory pension scheme that you can enter as soon as you join and where we will make a significant contribution to the cost of your pension.

- Generous paid maternity and paternity leave which is notably more than the statutory minimum offered by many other employers.
- Use of onsite facilities (where applicable).
- Occupational sick pay.



Civil Service Pension

“

As a Senior Civil Servant, your pension is the most valuable benefit after your salary that you have working with us in the Civil Service. Providing you with financial security when you retire and also providing cover for your family and loved ones should the worst happen.

”

Simon Claydon – Director of Civil Service Pay, Policy & Pensions



Great member pension

- ✓ Defined Benefit Pension Scheme
- ✓ Provides a secure pension payable for life with no investment uncertainty
- ✓ Choice of a tax-free lump sum
- ✓ Generous build rate of 2.32% of your earnings as a pension each year.
- ✓ Choice of entering a Defined Contribution scheme

What pension could you get?

- ✓ For example if you earned £70000 per year
- ✓ After 10 years you could have a pension of £16,610pa or a pension of £10,678pa and a tax free lump sum of £71,187
- ✓ After 20 years this could be £34,070pa, or a pension of £21,902pa and a tax free lump sum of £146,014

Generous employer contribution

- ✓ Employer contribution towards your pension is extremely generous – on average 27% of your pay
- ✓ These contributions pay for:
 - A pension for you
 - Pension for your loved ones
 - Death benefits
 - Ill health benefits

Death benefits

- ✓ Able to nominate anyone (including charities) for a tax-free lump sum in the event of your death
- ✓ Lump Sum of up to two times your pay
- ✓ Pension for your spouse/partner of around 37.5% of your pension
- ✓ Pension for eligible children

For more information on the Civil Service Pension Scheme please visit

www.civilservicepensionscheme.org.uk

[Return to contents](#)

Application Process

Green Park are managing this competition on behalf of HMRC. To apply for this post, please submit the following to <https://micro.green-park.co.uk/hmrc/how-to-apply/> no later than **23:55 on Monday, 20 January 2025**.

- A CV (around 2 pages) setting out your career history, with key responsibilities and achievements. Please ensure you have provided reasons for any gaps within the last two years.
- A Statement of Suitability (around 2 pages) that provides evidence of how your skills and experience meet the criteria in the person specification.

A full CV and Statement of Suitability will allow us to assess your application against the person specification. Please ensure both documents contain your full name and contact details.

If you are unfamiliar with a suitability statement or encounter any issues with your application, please contact James Greengrass at james.greengrass@green-park.co.uk

Shortlist

- An application pre-sift will be conducted by Green Park, followed by an in-depth review by the Selection Panel.

- The panel will assess all applicants against the criteria set out in the [Person Specification](#) and will shortlist those candidates who best meet the criteria for assessment and interview.
- Shortlisted candidates will also have the opportunity of an [informal conversation](#) with Myrtle Lloyd. This isn't a formal part of the process but an opportunity to gain greater insight into the role. This is optional but highly recommended.
- Appointments are conditional upon candidates undertaking a [Financial Probity](#) check if shortlisted for final interview. Please refer to FAQs for further information.

Selection Panel

This is a Civil Service Commission led appointment, and the review and shortlist will be chaired by [Elizabeth Hambley, Commissioner](#).

Panel members will include:

- [Myrtle Lloyd](#), Director General, Customer Services Group, HMRC (Vacancy Holder)
- [Justin Holliday](#), Chief Finance Officer, HMRC
- [Jo Mitchell](#), HR Director, Customer Service Group, HMRC

Disability Confidence Scheme (DCS)

Candidates applying under the Disability Confidence Scheme are guaranteed an interview if they meet the minimum criteria outlined in the person specification.

This scheme works in conjunction with the Great Place to Work for Veterans, for former members of the armed services, and the Redeployment Interview Scheme for existing Civil Servants at risk of redundancy. Each scheme works in the same way.

Use of Data

As part of the recruitment process, your data and assessment results may be shared with HMRC's SCS Talent team.

This will provide insight into how to support your development and wider talent management, if you are successful in your application.

Application Process (continued)

Assessments

If shortlisted for interview, you will be asked to take part in a Staff Engagement Exercise (SEE) and an Individual Leadership Assessment (ILA).

Assessments don't result in a pass or fail decision. Rather, they are designed to support the panel's decision making and highlight areas for further exploration at interview.

Full details of the assessment process will be made available to candidates if shortlisted for interview.

We will send you a copy of any report for any assessment that you may have undergone as part of the recruitment process (where applicable).

Interview

You will be asked to attend an interview for a more in-depth discussion of your previous experience and professional competence.

We will also ask you to prepare a 5-minute verbal presentation. Details will be issued in advance of your interview.

Interviews are expected to take place on [week commencing 10 March 2025](#) and will be held [in person at 100 Parliament Street, London](#) (full instructions will be issued prior to interview).

Regardless of the outcome, we will notify all candidates as soon as possible once all interviews have concluded.



Indicative Timeline



Closing date

23:55 on 20 January 2025



Longlist meeting

w/c 27 January 2025



Shortlist meeting

w/c 17 February 2025



Assessments and informal conversations

w/c 24 February & w/c 3 March 2025



Interviews

w/c 10 March 2025

These dates are only indicative at this stage and could be subject to change. Candidates are asked to note the above timetable, exercising flexibility through the recruitment and selection process. If you are unable to meet these timeframes, please let us know in your application letter.

Frequently Asked Questions (FAQs)

Can I apply if I am not currently a civil servant?

Yes. This role is open to suitably qualified people in the external market and to existing civil servants and those in accredited Non-Departmental Bodies.

Is this role suitable for part-time working?

This role is available for full-time or flexible working arrangements (including existing job share partnerships) but you should discuss your needs with the hiring manager if you are invited to interview.

Is this a permanent role?

Yes. This role is being offered on a permanent basis.

What is an assignment duration?

This role has a minimum assignment duration of 3 years. An assignment duration is the period a Senior Civil Servant is expected to remain in the same post to enable them to deliver on the agreed key business outcomes. The assignment duration also supports your career through building your depth of expertise.

As part of accepting this role you will be agreeing to the expected assignment duration set out above. This will not result in a contractual change to your terms and conditions. Please note this is an expectation only, it is not something which is written into your terms and conditions or indeed which the employing organisation or you are bound by.

It will depend on your personal circumstances at a particular time and business needs, for example, would not preclude any absence like family friendly leave. It is nonetheless an important expectation, which is why we ask you to confirm you agree to the assignment duration set out above.

What nationality do I need to hold in order to apply?

This role is broadly open to the following groups:

- ✓ UK nationals
- ✓ Nationals of the Republic of Ireland
- ✓ Nationals of Commonwealth countries who have the right to work in the UK

- ✓ Nationals of the EU, Switzerland, Norway, Iceland or Liechtenstein and family members of those nationalities with settled or pre-settled status under the [European Union Settlement Scheme \(EUSS\)](#)
- ✓ Nationals of the EU, Switzerland, Norway, Iceland or Liechtenstein and family members of those nationalities who have made a valid application for settled or pre-settled status under the [European Union Settlement Scheme \(EUSS\)](#)
- ✓ Individuals with limited leave to remain or indefinite leave to remain who were eligible to apply for EUSS on or before 31 December 2020
- ✓ Turkish nationals, and certain family members of Turkish nationals, who have accrued the right to work in the Civil Service.

FAQs

Will the role involve travel?

Yes. Regular travel across the UK to HMRC sites will be required as well as frequent Senior Leadership meetings in London.

Is security clearance required?

Yes. Appointment is conditional upon successfully completing a **BPSS** pre-employment check and achieving the required level of national security clearance. For this position, you will be required to have or obtain **Security Check (SC)** level.

For more information on the vetting process please visit [GOV.UK](https://www.gov.uk).

What is a Financial Probity Check?

Appointments are conditional upon candidates undertaking a financial probity check if shortlisted for final interview. Candidates are expected to have conducted their own tax affairs with probity; financial probity checks are carried out to minimise the risk that prospective candidates have behaved in ways likely to bring the tax system into disrepute.

Candidates shortlisted for interview will be asked to provide necessary personal information to allow HMRC to conduct these.

All information is dealt with in the strictest confidence and the outcome of the check will be shared with the Vacancy Holder only. Appointment is conditional on returning a successful outcome.

Can I claim back any expenses incurred during the recruitment process?

No. Unfortunately we will not be able to reimburse you, except in exceptional circumstances and only when agreed in advance.

Will this role be overseen by the Civil Service Commission?

Yes. As this role is one of the more senior posts within the Civil Service, a Commissioner will oversee the recruitment process and chair the selection panel.

What is the role of the Civil Service Commission in relation to recruitment into the Civil Service?

The Civil Service Commission has two primary functions:

- To provide assurance that selection for appointment to the Civil Service is on merit based on fair and open competition as outlined in the [Civil Service Commission's Recruitment Principles](#).

- For the most senior posts in the Civil Service, the Commission discharges its responsibilities directly by overseeing the recruitment process and by a Commissioner chairing the selection panel.
- To hear and determine appeals made by civil servants under the Civil Service Code which sets out the Civil Service values – Honesty, Integrity, Impartiality and Objectivity – and forms part of the relationship between civil servants and their employer.

What is a declaration of interest and when to inform us?

Candidates must note the requirement to declare any interests that might cause questions to be raised about their approach to the business of the Department. If you are unsure what a declaration or conflict of interest may be, please contact the team for more information.

If you believe that you may have a conflict of interest, please contact [Jashim Ahmed](mailto:jashim.ahmed@hmrc.gov.uk) at scs.resourcing@hmrc.gov.uk before submitting your application.

FAQs

What reasonable adjustments can be made if I have a disability?

We are committed to making reasonable adjustments

In order to support job applicants and ensure that you are not disadvantaged in the recruitment and assessment process.

Reasonable adjustments could include; allowing extra time during selection tests; ensuring that information is provided in an accessible format or; by providing training.

If you feel that you may need a reasonable adjustment to be made, or you would like to discuss your requirements in more detail, please contact us in the first instance.

If you wish to receive a hard copy of the information, or in an alternative format e.g. Audio, Braille or large font then please contact: scs.resourcing@hmrc.gov.uk

What do I do if I want to make a complaint?

If you feel that your application has not been treated in accordance with the recruitment principles and wish to make a complaint, then you should contact [Jashim Ahmed](mailto:jashim.ahmed@hmrc.gov.uk) at scs.resourcing@hmrc.gov.uk in the first instance.

If you are not satisfied after departmental investigation, you can contact the [Civil Service Commission](https://www.civilservice.com/civil-service-commission) at info@csc.gov.uk or in writing to:

Civil Service Commission, Room G/8, 1 Horse Guards Road SW1A 2HQ



Contact Us

If you would like to discuss the role in more detail, or you require assistance with the recruitment or application process, please contact James Greengrass at james.greengrass@green-park.co.uk

Our work is regulated by the Civil Service Commission.



HM Revenue
& Customs

[Return to contents](#)