



HERITAGE LIFECARE

Position Description

Innovation, AI & Transformation Specialist

Company Overview

Heritage Lifecare Limited is a provider of Residential Aged Care Facilities throughout New Zealand. We take pride in the value we add to the lives of all those who reside in our facilities. Our employees are united in our common purpose, mission and values and strive to ensure the delivery of respectful and caring services, in an environment that is safe for clients. Heritage aims to enable the continued pursuit of excellence in care through monitoring, auditing, actioning and evaluation of service whilst respecting and valuing our residents, families and staff.

As an organisation we are committed to providing 'A Better Everyday' for our residents, their whānau and friends, and our employees by aligning our actions to our company values:

- **People First - Kia tika te rere o te waka**
Enhance the health, safety, and wellbeing of our people
- **Nurturing Success - Poipoia te angitu**
Seize opportunities and experiences every day in every moment
- **Better Together - He toa takitini**
Work together in respect and harmony to empower everyone

At Heritage Lifecare Limited we are committed to embracing diversity by ensuring we apply the principles of merit, equality, fairness, and transparency to our working practices which enable decisions and actions to be free from discrimination, conflict of interest and favouritism. We do this with a commitment to the Principles of Te Tiriti o Waitangi – partnership, participation, and protection.

Heritage Lifecare is committed to Ngā Paerewa Health and Disability Services Standards, supporting a person and whānau-centred health and disability service, where people are empowered to make decisions about their own care and support in order to achieve their goals.

Reports to:

Head of Technology and Transformation

Functional Relationships:

Works closely with business owners, Technology, Operations, Finance, People & Culture, Clinical and Quality, Care Home and Village leaders, the Innovation Working Group, project governance forums and selected delivery partners. Work with external partners where knowledge, guidance and more complex expertise is required.

Internal Relationships

- Executive Leadership Team
- Technology Team
- Corporate Services Leadership
- Regional Business Managers
- Care Home and Village Managers
- Clinical and Quality teams
- People & Culture
- Finance
- Operations

- Marketing and Communications
- Employees and subject matter experts across Heritage

External Relationships

- Technology and AI vendors
- Implementation partners
- Consultants and specialist advisers
- Industry and technology networks

Position Purpose:

The Innovation, AI & Transformation Specialist is responsible for helping Heritage Lifecare identify, assess and deliver practical opportunities to use Artificial Intelligence, technology and innovation to improve the way we work.

AI innovation is one of the focuses of the position, alongside broader technology-enabled transformation. The role will develop and maintain Heritage's AI roadmap and opportunity pipeline, bring strong hands-on AI capability, and support the safe adoption and scaling of AI across the organisation. This includes developing appropriate solutions in-house, building the AI capability of others, and working with external partners where more specialist or complex expertise is required.

The role will also work with business owners to identify broader innovation and transformation opportunities, develop business cases and recommendations, and support approved initiatives from concept and pilot through to implementation, adoption and benefits realisation.

Sitting within the Technology and Transformation function, the role acts as a bridge between business needs and technology capability, combining strong AI knowledge with business acumen, commercial thinking and practical transformation delivery to achieve measurable organisational value.

The Innovation, AI & Transformation Specialist brings a practical mix of business analysis, innovation facilitation, process improvement, portfolio discipline, project and change management and technology adoption capability. The role is hands-on, outcome-focused and able to move between strategy, planning, delivery support and operational adoption.

Key Accountabilities:

AI & Innovation

- Develop, maintain and support delivery of Heritage's AI roadmap and prioritised pipeline of opportunities.
- Maintain strong knowledge of emerging AI capability, including generative AI, agentic AI and related technologies, and assess their relevance to Heritage.
- Identify and develop practical AI use cases that improve productivity, employee experience, decision-making, service delivery and resident outcomes.
- Bring strong hands-on AI capability to prototype, configure and develop solutions in-house where appropriate.
- Develop practical and repeatable approaches to support the safe development and scaling of AI solutions and agents across Heritage.
- Build AI confidence and capability across Heritage through demonstrations, guidance, coaching and training.
- Work with Technology and external AI partners to deliver more complex solutions, ensuring they meet Heritage's business requirements.
- Manage relevant AI vendor and partner relationships and support the evaluation of emerging AI products and platforms.

Opportunity Assessment & Business Cases

- Partner with business owners and teams to understand business challenges, opportunities and desired outcomes.
- Facilitate discovery and problem definition to identify where AI, technology, automation or process improvement could add value.
- Assess opportunities based on business value, feasibility, cost, risk, customer or resident impact and organisational readiness.
- Develop clear recommendations and business cases, including expected benefits, costs, implementation requirements, risks and measures of success.
- Support prioritisation of AI, innovation and transformation opportunities through the appropriate governance forums.
- Challenge existing ways of working and identify opportunities to simplify or improve processes before introducing technology.

Transformation Delivery

- Support approved AI, innovation and technology-enabled transformation initiatives from concept through design, pilot, implementation and transition to BAU.
- Translate business needs into clear process, technology, data and solution requirements.
- Work with business owners, Technology, vendors and delivery partners to develop and implement practical, sustainable solutions.
- Apply fit-for-purpose project and business analysis disciplines to support effective delivery.
- Identify and escalate key risks, dependencies, resource constraints and delivery issues.
- Ensure successful pilots move into sustainable operational use rather than remaining isolated experiments.

Adoption & Change

- Support leaders and teams to redesign processes and ways of working to realise the benefits of AI and technology-enabled change.
- Assess change impacts and support appropriate stakeholder engagement, communications, training and business readiness.
- Develop practical resources, guidance and support that enable employees to confidently adopt new tools and ways of working.
- Build internal capability so appropriate AI solutions and practices can increasingly be supported and developed within Heritage.
- Work with People & Culture and Learning & Development where broader capability development is required.
- Support initiatives through transition and adoption to help embed sustainable change.

Governance & Benefits Realisation

- Ensure AI and transformation initiatives operate within Heritage's governance, security, privacy, data and risk requirements.
- Maintain a central register of approved AI solutions and agents, including ownership, purpose, data access, risks, controls and support arrangements.
- Support responsible AI practices, including appropriate human oversight, ethical use and compliance with relevant regulatory obligations.
- Establish clear success measures and expected benefits for AI and transformation initiatives.
- Monitor adoption, performance and business outcomes from implemented solutions.
- Measure realised benefits, including productivity improvements, time saved, quality improvements, employee and resident experience, risk reduction and cost reduction or avoidance.
- Provide regular reporting on initiatives, adoption, benefits and risks.
- Recommend whether initiatives should be scaled, changed, sustained or discontinued based on evidence and results.

Financial Authority

- Financial and operational authority will be confirmed for each assignment in accordance with the organisation's Delegated Authorities Policy and the responsibilities temporarily assigned to the position.

Core Competencies

Strategic Thinking

Understands Heritage's strategic direction and connects innovation, automation, AI and transformation activity with opportunities that deliver meaningful organisational value.

Business & Commercial Acumen

Understands business operations, identifies where technology can make a genuine difference and maintains a strong focus on value and outcomes.

Technology & AI Acumen

Maintains practical working knowledge of AI, automation and enterprise productivity technologies and can assess their capability, limitations and operational application.

Innovation & Curiosity

Actively explores new ideas, challenges existing approaches and encourages responsible experimentation and continuous improvement.

Delivery & Results Focus

Turns ideas into practical outcomes, maintains momentum and supports successful initiatives from discovery through to implementation, adoption and measurable benefit.

Stakeholder Partnership

Builds strong relationships and works collaboratively across technical and non-technical teams to achieve shared outcomes.

Influencing & Communication

Communicates technical concepts clearly, influences effectively and adapts communication to different audiences.

Change & Adoption

Understands that technology alone does not deliver transformation and actively supports leaders and employees to adopt new ways of working.

Judgement & Risk Awareness

Balances innovation with sound judgement and ensures appropriate consideration of privacy, security, ethics, data and organisational risk.

Continuous Improvement

Regularly identifies opportunities to simplify, improve and enhance processes, systems and ways of working.

Health, Safety & Wellbeing

All employees are responsible for contributing to a safe and healthy workplace and are expected to:

- Take reasonable care for their own health and safety and that of others.
 - Follow Heritage Lifecare health, safety and wellbeing policies, procedures and reasonable instructions.
 - Identify, report and appropriately manage hazards, risks, incidents and concerns.
 - Actively contribute to a culture where the health, safety and wellbeing of our people, residents and visitors is prioritised.
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Skills Knowledge and Experience:

Qualifications

Essential

- Demonstrated experience in innovation management, transformation delivery, AI adoption, business process automation, project coordination, business analysis, change management or a related field.
- Strong practical and technical knowledge of modern Artificial Intelligence technologies, including generative AI, agentic AI and their practical application within organisations.
- Demonstrated ability to identify business opportunities and translate them into technology-enabled solutions.
- Experience leading pilots, proofs of concept, transformation initiatives, automation delivery or implementation programmes.
- Strong understanding of business processes, value streams, business capabilities, operating models and continuous improvement.
- Ability to assess opportunities based on business value, feasibility, risk and return on investment.
- Experience using portfolio, project and change management disciplines to coordinate work, manage dependencies and support adoption.
- Strong stakeholder management and influencing capability, including experience working with senior leaders.
- Excellent communication skills with the ability to translate complex technical concepts into clear business language.
- Strong analytical, problem-solving and critical-thinking capability.
- Understanding of technology governance, information security, data privacy and responsible AI principles.
- Demonstrated ability to manage multiple initiatives and priorities in a changing environment.
- Experience working with Microsoft 365, Copilot, ChatGPT agents, Power Platform, SharePoint, Teams, workflow automation or comparable enterprise productivity platforms.

Desirable

- Relevant tertiary qualification in technology, information systems, business, data, engineering or a related discipline.
- Experience implementing AI, agentic AI, workflow automation or process improvement solutions in a complex multi-site organisation.
- Experience within healthcare, aged care or another highly regulated environment.
- Experience working with cloud technology, Microsoft technologies and enterprise AI platforms.
- Experience in process redesign, value stream mapping, change management or organisational transformation.
- Experience developing business cases, tracking benefits and measuring technology-enabled change outcomes.

Key Competencies

- Demonstrated experience leading change or operational improvement projects
- Strong project planning, coordination and reporting capability
- Proven ability to operate effectively across multiple locations
- Business and commercial acumen and experience supporting measurable productivity, adoption, value-stream, risk reduction or service-improvement outcomes
- Ability to rapidly assess an operating environment and identify priorities
- Ability to lead through influence where there is no direct reporting relationship
- Strong written communication and executive reporting skills
- Adaptability and confidence working in changing assignments

The intent of this position description and person specification is to provide a representative summary of the major duties and responsibilities performed by employees in this job classification. Employees may be requested to perform job related tasks other than those specified in this Position Description.