



AT A GLANCE

 **30+**

years' professional experience

 **1,600+**

staff led as executive director

 **100+**

clients served nationally and internationally

 **Awards**

Finance Director of the Year, HFMA finalist 2016

Client service awards, KPMG

SECTORS

- ① NHS providers & commissioners
- ① NHS Wales & digital health
- ① Commissioning Support
- ① Central government
- ① International
- ① Private sector

QUALIFICATIONS

- ① Chartered Public Finance Accountant (CPFA)
- ① Master of Business Administration (MBA)
- ① SAP R/3 accreditation in Finance & Controlling (FI/CO)

CONTACT

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Financial leadership that drives results – robust business cases, strong governance and financial transformation, leading to better decision-making and outcomes

More than 30 years' experience in financial management and professional advisory services across the public and private sectors, nationally and internationally. Carl is an effective executive leader of high-performing teams and a specialist in financial management and control, business planning, governance, transformation and change.

KEY EXPERIENCE

 **Financial Leadership.** Director of Finance & Commerce at NHS Midlands & Lancashire CSU, providing executive leadership to over 1,600 staff and c.80 finance professionals; HFMA Finance Director of the Year finalist 2016.

 **Business Cases & Finance.** Economic and financial cases under the Treasury five-case model – all-Wales Integrated Care Viewer, Point of Care Testing, Electronic Prescribing, Connecting Care and Digital Maternity; Lincolnshire Partnership NHS Foundation Trust SOC.

 **Financial Systems.** SAP R/3 FI/CO accredited; procurement financial models and performance reporting.

 **Transformation & Change.** Finance function redesign, process redesign and restructuring.

 **Business Development.** Secured national procurement framework accreditation and significant new business for the CSU; produced over 80 high-quality proposals at KPMG.

 **Governance & Control.** Standing Orders, SFIs and schemes of delegation for 12 CCGs; five sets of accounts with unqualified audit opinions; internal control reviews in Ireland and Scotland.

CLIENTS INCLUDE

Digital Health and Care Wales • Commissioning Support • NHS Commissioning Groups • Department for Transport • Driving Standards Agency • Crowe (Ireland) • Kingdom of Saudi Arabia



CAREER HISTORY

SENIOR ASSOCIATE, IN-FORM SOLUTIONS · JUNE 2020 – PRESENT

Business & Finance Consultant specialising in financial management, business planning and change management for public and private sector projects, with expertise in health.

Digital Health & Care Wales (DHCW) 2023 – 2026

- ① Developed comprehensive business cases for the Integrated Care Viewer, Welsh Point of Care Testing, Electronic Prescribing Service and Connecting Care programmes under the Treasury five-case model – focusing on the economic and financial cases, including modelling and evaluation of costs, benefits, risks and funding assumptions (2024 – 2026).
- ① Undertook a scoping review and then developed the Outline Business Case for Digital Maternity Care services across Wales (2023).
- ① Completed an OBC to commission a Clinical Data Engine Platform across Wales, including modelling for the economic and financial cases (2023).
- ① Led the development of a procurement financial model for Digital Maternity Care (2023).

Specialist Technology Company, Ireland 2026

- ① Commercial review that identified practical improvements to the business development, bidding processes and pricing mechanisms to support business growth targets (2026).

Lincolnshire Partnership NHS Foundation Trust 2025

- ① Developed the economic and financial case for a Strategic Outline Case to improve and modernise the commissioning and delivery of mental health, dementia, learning disability and autism services in Lincolnshire.

Crowe (Ireland) 2021 – 2022

- ① Provided specialist financial and consultancy services to clients in Ireland and Scotland, delivering bespoke programmes that improved internal control, risk management and corporate governance.
- ① Undertook checkpoint reviews for major public sector infrastructure programmes.

NHS Midlands & Lancashire CSU 2020 – 2023

- ① Delivered a wide range of consultancy projects, including a review of performance reporting, procurement of new systems and software for professional services, financial advisory, costing and budget planning projects.

Kingdom of Saudi Arabia – Primary Healthcare 2020 – 2021

- ① Assessed and reported on the operating model of a primary healthcare centre, with proposals for a new model of care in line with Vision 2030 and the Kingdom's commitment to a healthier community through primary care.

DIRECTOR OF FINANCE & COMMERCE / CFO · JAN 2013 – JUN 2020

NHS Midlands & Lancashire Commissioning Support Unit HOSTED BY NHS ENGLAND AND IMPROVEMENT

Executive Director of a business process outsourcing organisation serving c.50 customers

- ① Established a robust, customer-focused business while maintaining high standards of control and corporate governance.
- ① Played a pivotal role in significantly growing the business while consistently achieving performance targets.
- ① Led the organisation to accreditation on national procurement frameworks, securing significant new business.
- ① Provided executive leadership to over 1,600 staff and professional leadership and development to c.80 finance and accounting staff.
- ① Finalist, HFMA Finance Director of the Year 2016.

BUSINESS & FINANCE CONSULTANT · DEC 2008 – DEC 2012

Capricorn Advisory Services Limited FINANCIAL MANAGEMENT AND BUSINESS ADVISER

Projects in the public and private sectors, including:

Commissioning Support (NHS) – Financial Strategy & Planning JUL – DEC 2012

- ① Supported two organisations with their full business cases in readiness for commercial operations.



South London Cluster (NHS) – Financial Governance Framework MAY – JUN 2012

- ① Produced Standing Orders, Prime Financial Policies, Scheme of Delegation, committee terms of reference and a conflict of interest policy for 12 CCGs across South London.

Staffordshire Commissioning Support (NHS) – Financial Strategy & Planning FEB – APR 2012

- ① Interim Finance Director leading the business plan for the Department of Health's detailed business assessment of commercial capability.

SME Business – Marketing Strategy Development DEC 2011 – JAN 2012

- ① Developed and implemented a digital marketing strategy and social media campaigns, significantly increasing reach and doubling daily traffic to the retail website.

Central Government – Shared Services Adviser OCT – NOV 2011

- ① Supported a major business development proposal for outsourcing shared services in response to a government procurement, focusing on financial projections, pricing and KPIs.

NHS South West London – Financial Control & Governance MAR – SEP 2011

- ① Managed completion of five sets of annual accounts, all receiving unqualified external audit opinions, and established a new governance framework (Standing Orders, SFIs and delegations) to tight timescales.

Department for Transport – Finance Programme Manager JUN 2009 – FEB 2011

- ① Programme lead for a back-office review to improve the efficiency of finance processes and redesign the finance function – identifying savings of 33% (£9.4 million), building the business case for change and supporting implementation.

Driving Standards Agency – Deputy Finance Director MAY 2008 – MAY 2009

- ① Operational lead for the finance and procurement function (40 staff): led cost reduction during the economic downturn, restructured the finance function, improved purchase-to-pay processes, business planning, reporting and pricing, and secured improvements from shared financial services.

PRINCIPAL ADVISER · JAN 1999 – NOV 2008

KPMG LLP FINANCIAL MANAGEMENT ADVISORY SERVICES

- ① Specialist in financial management transformation – finance function reviews, process optimisation, benchmarking, management information, integration, performance improvement, capital investment appraisal and programme and project management.
- ① Author of national research into developing leading-practice finance functions in the health sector; helped aspirant foundation trusts improve their finance functions.
- ① Led high-performing multi-disciplinary teams, coaching and mentoring them in line and project roles; produced over 80 high-quality proposals across a range of sectors.
- ① Head of Solutions, developing innovative financial management solutions and toolkits; UK representative on an international solution development team for integrating finance functions.
- ① Winner of KPMG Client Service Awards for 'Best Innovation' (2007) and 'Best Breakthrough in a Client Relationship' (2005).

SENIOR CONSULTANT (SAP R/3) · JAN 1997 – DEC 1998

Enable Information Technology Ltd SAP IMPLEMENTATION

- ① Gained worldwide accreditation in the SAP R/3 Finance and Controlling modules and implemented the system as part of a multi-disciplinary team at a £100 million subsidiary of a major drinks company.

MANAGING DIRECTOR · APR 1990 – JAN 1997

Consultia Services FOUNDER

- ① Led a management consultancy providing financial management and IT advisory services to high-profile public and private sector organisations in the energy and retail sectors.
- ① Designed, marketed and sold software to the NHS for statutory accounts, financial returns and cash-flow monitoring and planning.