



Personal Profile & Qualifications

Key Experience

- ① Experienced Chief Finance Officer
- ① Executive leader
- ① Specialist in Financial transformation.
- ① HFMA Finance Director of Year national finalist.

Qualifications

- ① Chartered Public Finance Accountant
- ① Master's in business administration
- ① SAP R/3 Accreditation in FI/CO

Professional Profile

Carl is an experienced Chief Finance Officer and Finance Consultant who has worked in financial management and professional advisory services for over 30 years.

He is effective at leading high performing teams at executive level in organisations and has worked extensively across the public and private sectors both nationally and internationally.

He is a specialist in financial management and control, business planning, change management and transformation programmes.

Career History

Business & Finance Consultant Associate

June 2020-Present

Senior Associate of In-Form Solutions and specialist in financial management, business planning and change management for projects in the public and private sectors with expertise in the health sector.

NHS Digital Health Care Wales (DHCW) – part of Welsh Government

- ① Undertook a scoping review for the preparation of an Outline Business Case for Digital Maternity Care services across all of Wales (2023)
- ① Supported the development and completion of two separate five stage OBC's for Digital Maternity Care (DMC) Services and a Clinical Data Engine across all of Wales, including financial modelling for each. (2023)
- ① Led the development of a procurement financial model for DMC (2023).

Crowe (Republic of Ireland)

- ① Provided specialist financial and consultancy services to clients based in Ireland and Scotland. This involved undertaking bespoke programmes of work that led to improvements to systems of internal control, risk management and corporate governance. Carl also undertook several checkpoint reviews for major public sector infrastructure programmes (2021/22).

NHS Midlands & Lancashire CSU

- ① Undertook a wide variety of projects including a review of performance reporting, the procurement of new systems and software for professional services and a variety of financial advisory, costing and budget planning projects (2020-23).



Consultancy project in the Kingdom of Saudi Arabia

- ① An assessment and reporting of the current operating model of a primary healthcare centre, providing proposals based on a new model of care in line with Vision 2030, the Kingdom of Saudi Arabia's commitment to a healthier community through primary care.

Director of Finance & Commerce/CFO

NHS Midlands & Lancashire Commissioning Support Unit

Jan 2013-Jun 2020

Executive Director of a business process outsourcing organisation hosted by NHS England and Improvement serving c.50 customers. Established a robust, customer-focused business whilst maintaining high standards of control and corporate governance. Pivotal role in significantly growing the business, whilst consistently achieving performance targets. Led the organisation in gaining accreditation to national procurement frameworks and secured significant levels of new business. Executive leadership to over 1,600 staff and responsible for professional leadership and development to c.80 finance and accounting staff.

Finalist HFMA Finance Director of the year - 2016.

Business and Finance Consultant

Capricorn Advisory Services Limited

Dec 2008-Dec 2012

Financial management and business adviser undertaking projects in the public and private sector.

Commissioning Support (NHS) – Financial Strategy and Planning (Jul 12 – Dec 12)

Assisting 2 organisations with their full business case in readiness for commercial operations.

South London Cluster (NHS) – Financial Governance Framework (May 12 – Jun 12)

Production of Standing Orders, Prime Financial Policies, Scheme of Delegation, Committee Terms of Reference and Conflicts of Interest policy for 12 CCGs covering South London.

Staffordshire Commissioning Support (NHS) – Financial Strategy & Planning (Feb 12-Apr 12)

Interim Finance Director leading the development of the business plan as part of the Department of Health's detailed business assessment of commercial capability.

Marketing Strategy Development, SME Business (Dec 11-Jan 12)

Developing and implementing of a digital marketing strategy and social media campaigns resulting in a significant increase in reach to potential customers and doubling of daily traffic to the retail website.

Shared Services Advisor (Central Government) (Oct 11 – Nov 11)

Assisting with the production of a major business development proposal for outsourcing of shared services in response to a government procurement exercise. Particular focus on financial projections, pricing and KPIs.

Financial Control & Governance Project, NHS South West London (Mar 11 – Sep 11):

Managed completion of five sets of annual accounts, all receiving an unqualified external audit opinion. Established a new governance framework (Standing Orders, SFIs and Delegations) under tight timescales.



Finance Programme Manager, Department for Transport, London (Jun 09 – Feb 11): Programme Lead for a back-office review to significantly improve the efficiency of finance business processes and redesign of the finance function. Identifying cost saving opportunities of 33% (£9.4 million), building the business case for change and providing change management advice and assistance with implementation.

Deputy Finance Director, Driving Standards Agency, Nottingham (May 08 – May 09): Operational lead for finance and procurement function (40 staff). Initiated cost reduction in response to an economic downturn, restructured the finance function, implemented purchase to pay process improvements, improved business planning and reporting, pricing, identified VFM initiatives and secured improvements from shared financial services.

Principal Advisor
KPMG LLP Financial Management Advisory Services **Jan 1999-Nov 2008**

Specialist in financial management transformation including finance function reviews, process optimisation, benchmarking, management information, integration, performance improvement, capital investment appraisal and change/programme/project management. Author of national research into the challenges and opportunities for developing leading practice finance functions in the health sector. Helped aspirant foundation trusts to improve their finance functions.

Experienced leader of high performing multi-disciplinary teams, responsible for coaching and mentoring in both a line role and project environment. Significant experience of business development, including production of over 80 high quality proposals across a variety of sectors.

Head of Solutions responsible for developing innovative and compelling financial management solutions and toolkits. UK representative of an international solution development team for integrating finance functions.

Winner of a Client Service Award in 2007 for 'Best Innovation' and 'Best Breakthrough in a Client Relationship' in 2005.

Senior Consultant (SAP R/3)
Enable Information Technology Ltd **Jan 1997-Dec 1998**

Gained world-wide accreditation in the finance and controlling modules of SAP R/3 and part of a multi-disciplinary team that implemented the system in a £100 million subsidiary of a major Drinks company.

Managing Director
Consultia Services **Apr 1990-Jan 1997**

Founder of a consultancy providing financial management and IT advisory services to high profile public and private sector organisations in the energy and retail sectors. Designed, marketed, and sold innovative software solutions to the NHS to produce statutory accounts, financial returns and cash flow monitoring and planning.

Company Accountant/Secretary
MKA Group **Apr 1989-Mar 1990**

Company Accountant and Company Secretary for an owner-managed recruitment and software business, with turnover of c.£5 million.

Regional Finance Trainee
West Midlands Regional Health **Sep 1984-Mar 1989**

Trained and qualified as a CIPFA accountant on a fast-track financial management scheme achieving first time passes of the professional examinations.