



Chief Financial Officer Appointment brief

February 2025

Reference: FALCH

Introduction from our CEO

Dear candidate

Thank you for your interest in joining us to make a real and important difference for disabled people – today and for the future.

A leading disability charity, for more than 75 years, Leonard Cheshire has been supporting disabled people and working to break down barriers that deny them their basic rights. We have grown to a large, complex charity of c.£125m turnover with a range of services, activities and regulators, the core of that is delivered through care offerings helping disabled people to live, learn and work as independently as they choose. Our impact and the difference our services make to disabled people is life-changing, vital and tangible.

We now require a new Chief Financial Officer to join us, to help drive us further forward, and bring about a transformative impact on our organisation and service offering.

With our turnaround plan being executed and a new Board of Trustees complete, we have been making some key strategic decisions – such as ceasing our international work and starting a process of consolidation of our UK service offering – and I am convinced that we are on the right path to success. However, there is still an enormous amount of work to do.

We are now seeking a permanent, commercially-minded and strategic Chief Financial Officer to work in partnership with me as CEO, the Board, Executive Team and our key stakeholders to achieve our financial turnaround and transformation, and deliver our new strategy. To do this, we will need to continue the turnaround of our organisation from a financial perspective and deliver a firm financial footing by reverting to our core business of providing support for severely disabled people. We are talking to our local authority customers about the need to change and evolve our service offering to meet the challenges of the decades ahead, so this a great time to be joining Leonard Cheshire.

This is a significant leadership role in both scale and remit. We need a Chief Financial Officer who can clearly demonstrate that they have prior experience in successfully delivering a commercial turnaround and transformation of a finance function, to ensure Leonard Cheshire has a highly effective team and operates an exemplary financial control environment.

This is a vital moment for our organisation, and we encourage you to apply if you are drawn to a turnaround and transformation agenda and have a deep empathy for our mission to support disabled people in one of the UK's leading and largest charities in this field. I look forward to receiving your application.

Yours sincerely

Dr Ruth Owen OBE - Chief Executive



About Us

One in five people in the UK will become disabled in their lifetime. Leonard Cheshire believes in a fair world in which disabled people have the same equal opportunities and choices as non-disabled people. For nearly 75 years, Leonard Cheshire has worked directly with disabled people to break down the barriers they face, collaborating with organisations and the public to challenge discrimination and promote inclusive practices.

Today, our 4,000 staff provide social care services support to help over 2,000 disabled people across the UK. In addition to offering high-quality care, we lead campaigns to influence government to implement legislation that positively benefits the lives of disabled people. As well as fighting for disabled people's rights, we work with partners to deliver support and life-changing programmes.

As one of the UK's leading charities for disabled people, we believe disabled people should have the freedom to live their lives the way they choose – with the opportunity and support to live independently, to contribute economically and to participate fully in society.

In numbers



One in five

One in five of us will be affected by disability at some point in our lives.



15 per cent of the world population

It is estimated that people with disabilities represent at least 15 per cent of the world population or more than 1 billion individuals.



Less likely to be employed

1 in 5 (19%) employers say they would be less likely to hire someone with a disability.



More likely to be out of work

Only around half (53.7%) of disabled people are in work, compared to more than four-fifths (82%) of non-disabled people.

Please find more detail on our financials in our [annual report](#) for 2022-2023.

Our values

We are:

- **Positive**
Warm and empathetic, we always look to progress and improve
- **Proud**
Strong willed and spirited, we are firm in our beliefs; and
- **Pioneering**
Confident and imaginative, we are creative change-makers.

Our UK Care Services

Following its formation in the aftermath of World War II, Leonard Cheshire became known as a pioneer in providing care services, not only with its homes but also in providing care in the community.

Frontline care and support, in residential and supported living services across the UK, remains at the core of what we do. More than 2,000 disabled people are supported every day through our care services. **We are amongst the highest rated providers of care and supported living services in the UK, with 93% of our services are rated as 'good' or 'outstanding' by regulators (March 31, 2022).**

We have:

- over 40 residential services (care and nursing homes)
- 44 supported living services.

Our approach is based on the promotion of greater independence and choice for the disabled people we support. This includes use of pioneering technology that gives greater control to people, as well as driving forward improvements in care.

But the needs and preferences of disabled people and commissioners are changing. We continue to explore opportunities that give disabled people greater choice in where they live and the type of support available, responding to unmet need where we can.

Technology is a powerful tool for independent living. It creates choice and opportunities in disabled people's lives that were previously unimaginable. Using the latest assistive technology more widely at our services is an important part of our vision to change the way social care is delivered, and what good looks like.



Our impact

Our work has an impact on individuals, the public, and organisations at national level

Impact for individuals

Our aims

- Disabled people feel respected, valued and safe, choose where and how they live, and participate freely in social and leisure activities.
- People achieve improved learning outcomes, their aspirations for work, and financial control.
- People can optimise their health and wellbeing.

Our actions

- We **support disabled people to claim their rights, access quality learning and work, and live as they choose.**
- We work with families and communities to be inclusive.

Impact on organisations and the public

Our aims

- The public adopts inclusive behaviours towards people with disabilities.
- Communities are fully accessible – including homes, public spaces and transport.
- Education providers and employers enable full participation.
- Technology, products and services are designed to be inclusive.

Our actions

- We champion rights, promote inclusive behaviours and challenge discrimination.
- We **campaign and use our influence to increase access to education, employment, transport and buildings.**
- We work with organisations to foster inclusive practices.
- We promote inclusive innovation in technology, products and services.

Where we are today

In 2017, Leonard Cheshire agreed a five-year strategy to modernise its extensive Care Home Business to provide Supported Living Accommodation. This was to enable clients to transition from passive recipients of care into active citizens engaged in education, training, and employment. An ambitious fundraising target of £50 million a year was agreed by the Chief Executive and the Board of Trustees. The strategy also involved the sale of 20 of the more traditional Care Homes and the introduction of a new data and digital strategy.

At the midpoint of delivering the strategy, Leonard Cheshire was hit by a perfect storm. This included the onset of Covid resulting in substantial unfunded costs for PPE etc; challenges in recruiting permanent Care Workers resulting in substantial additional costs associated with agency workers; a less than successful implementation of the data and digital strategy; reduced funding from central government for international programmes; reduced funding and lower than necessary annual fee increases from Local Authorities for care home places and, a profound impact from the pandemic on fundraising activities.

The consequences of these events have resulted in the Charity experiencing significant financial headwinds. Over the last 3 years, we have recruited a new Chief Executive, other key executives, and a Commercial Director to renegotiate fees with Local Authorities.

We have had to make some tough decisions, but we are heading in the right direction.

We have refreshed our Board of Trustees to ensure that the requisite skills, experience and good governance are in place for the organisation's needs now and in the future; we have focused on key experience areas by introducing trustees with experience in senior level audit, finance, adult living social care, and local authority finance.

We will need to continue our good progress in turning the organisation around from a financial perspective, and subsequently establish a firm financial footing by reverting to our core business of providing support and accommodation for severely disabled people. And we are now starting to look to our future strategy.



The role

This is a significant leadership role. Leonard Cheshire needs a new permanent Chief Financial Officer who can clearly demonstrate that they have prior experience in successfully delivering positive commercial and financial transformation in an environment experiencing similar challenges within a c. £125 million business or larger.

The Chief Financial Officer will lead the continued transformation of the finance function itself to ensure Leonard Cheshire has a lean, highly performing team, which supports a vital charity and operates an exemplary financial control environment. Consequently, the Chief Finance Officer must demonstrate that they have experience of the transformation of all aspects of a finance function.

You will work hand in glove with an ambitious Chief Executive to deliver, at pace, the requirements of this role. You will be jointly responsible, with the Chief Executive, to report regularly to the Board of Trustees to ensure they are satisfied that efficient and effective progress is being made, including against the recommendations of externally commissioned reports; the expectations of our regulators including the Charity Commission and Care Quality Commission; our Bank and that the required controls are designed and implemented successfully in a timely manner.

Key responsibilities include:

- Support the Chief Executive by leading on the financial turnaround.
- Lead the continuing transformation of our finance function:
 - Building, leading, and developing a finance team that is capable of delivering the many and varied financial and operational challenges that we will be facing over the next five years.
 - Strengthening and, where necessary, rebuilding the financial control environment to ensure it is appropriate and exemplary for a charity with Leonard Cheshire's scale and complexity.
- Be responsible for ensuring that there is an effective working relationship with, and appropriate reporting to the Audit, Risk & Finance Committee. Maintain a strong relationship with the Committee Chair.
- Be responsible for Business and Financial planning, by building on the success of the turnaround plan, to ensure that we are safeguarding our residents; and presenting opportunities for them to live, learn and earn. The Business and Financial Plan will, amongst other things, ensure that we are recruiting and developing our people in partnership with the People Director and Chief Executive to ensure that Leonard Cheshire returns to the forefront of charities providing living services for disabled people.
- Establish a robust Strategic and Operational Risk Management framework; and provide oversight and the delivery of Operational Risk Management to extend it beyond the existing financial risk management approach to ensure that Trustees can confidently report rapid progress to meet the oversight currently being provided by the Charity Commission and the Care Quality Commission.
- Demonstrate a track record the finance leader and Executive team member delivering organisational growth through transformational change.
- Work alongside our Company Secretary to support them in their role of being responsible for legal and governance related matters.
- Work alongside our commercial team, supporting annual revenue negotiations and growth, particularly in Supported Living, with our local authority customers who provide the funding for our clients in a way that ensures sufficient income to cover our central costs.

- Build effective internal working relationships with the Executive Leadership Team and Trustee colleagues.
- Proven experience of quality Treasury/cash management
- Manage, in collaboration with the Chief Executive, external relationships including External Audit, our Bank, suppliers and others.
- Have prior experience of raising finance from Banks and ensuring continued covenant compliance.
- Demonstrate proven written and oral communication skills to support increased collective collaboration between the Executive Leadership Team and Trustees.
- Have some prior experience of having replaced a core financial system to improve operational effectiveness, financial reporting and financial accountability.
- Ideally bring prior experience of business and property disposals.

You will provide leadership and guidance to continue the turnaround at pace, alongside overall financial management of the enterprise. This will be achieved by delivering timely financial analysis and robust financial controls in liaison with the Chief Executive, Executive Leadership Team, heads of department and their teams. You will also support, advise and co-ordinate the finance roles within the Finance Department and provide monthly updates to the Board of Trustees.

You will also support our commercial negotiations with Local Authorities to secure sufficient funding to support our service users to derive sufficient income to cover our operations and central overheads. You will support our Strategic Delivery Director in the divestment of further properties to secure optimal value from these assets.

You will develop financial analyses for further cost savings, identify key trends and issues impacting financial performance and identify opportunities for income generation and improvements to promote more efficient working practices.

You will highlight key issues affecting financial performance, ensure robust financial controls and management oversight are in place in our offices.

You will lead the preparation and completion of the year end statutory audit.

Typical duties include leadership on:

- Delivering the turnaround plan at pace and reporting progress to the Board
- Overseeing departments involved in the purchase, pricing, investments, debt management and accounts payable and receivable
- Managing financial control, risk, and monthly reporting
- Developing a financial strategy
- Reviewing, condensing and presenting business finance reports
- Leading on the annual financial planning and budget cycle
- Monitoring the business's financial plans
- Maintaining financial compliance
- Tracking cash flow and analysing the charity's financial weaknesses and strength, and proposing corrective actions
- Banking relationship management and covenant compliance
- Leading relationship with our External Auditors



Person specification

You will have considerable experience in a financial leadership position, working in complex, multifaceted and large organisations. Experience of social care is also desirable but not essential. You will be fully qualified (CIMA, ACCA, ACA, or CPA) with strong financial management experience, with involvement in setting up or re-engineering and running finance systems and processes.

Intellect and experience

Essential skills include:

- A resilient individual with experience of strategic planning and good commercial financial acumen
- Understanding of how to successfully develop both internal and external stakeholder engagement
- Strong written communication skills and presentation style
- Excellence in performance reporting, including setting and forecasting of budgets
- Experienced in FP&A
- Experience of overseeing treasury function and working capital management
- Preparation and delivery of annual audit and financial accounts
- Comfortable in the use of various finance related systems, including leading the implementation of these
- Consistently aiming for 'value for money', using economy, efficiency and effectiveness
- Experience of managing and developing a high performing finance team, building resilience and capability

Desirable skills include:

- Experience of using Dynamics 365 /Power BI
- Experience of best accounting practice/SORP within the charity sector

In addition, the Chief Financial Officer needs the following attributes:

Independent thought and confidence in own decision making

- Provide support and challenge appropriately without micromanaging
- Outcomes focussed, able to balance commercial flair with the charity's objectives

Practical and pragmatic

- Realistic about where we are and our short, medium and long-term priorities
- Bringing a hands-on approach
- A primary gatekeeper mindset

Integrity

- Have the highest personal standards of honesty, reliability, and commitment to the role
- Lead by example
- Always do the right thing, and have the right conversations, even if this is difficult
- Collaborative and able to win trust and confidence across the organisation

Personal strength

- Give strength and support to others while being resilient yourself
- A team player who can collaborate with stakeholders and colleagues
- Humility
- Able to deal with the 'bad times', and able to bounce back after them

Clear vision and passion for the work

- Clear strategic vision for the finance function and how that links to our overall strategy
- Passion, and empathy, for the work of the charity with a commitment to the values and ethos of Leonard Cheshire

Emotional intelligence

- Ability to read people and build effective relationships with them
- Deal with conflict well

Courage

- Make courageous decisions in the best interests of the organisation, which are not always popular



Terms of appointment

Salary: Competitive

Location: Flexible, including some home working, with a willingness to travel for meetings and undertake travel across the UK.

What we Offer

- The necessary resources (people and investment), supported by the Board of Trustees and Chief Executive, to deliver the requirements of this challenging new role
- A generous employer contribution to a company DC pension scheme with additional life cover
- Substantial annual leave, with the option to buy or sell leave
- Access to a cash health plan at favourable rates
- A comprehensive Employee Assistance Programme

How to apply

Saxton Bampfylde Ltd is acting as an employment agency advisor to Leonard Cheshire on this appointment.

Candidates should apply for this role through our website at www.saxbam.com/appointments using code FALCH

Click on the 'apply' button and follow the instructions to upload a CV and cover letter and complete the online equal opportunities monitoring* form.

The closing date for applications is noon on Friday 21 February.

* The equal opportunities monitoring online form will not be shared with anyone involved in assessing your application. Please complete as part of the application process.

GDPR personal data notice

According to GDPR guidelines, we are only able to process your Sensitive Personal Data (racial or ethnic origin, political opinions, religious or philosophical beliefs, trade union membership, genetic data, biometric data, health, sex life, or sexual orientation) with your express consent. You will be asked to complete a consent form when you apply and please do not include any Sensitive Personal Data within your CV (although this can be included in your covering letter if you wish to do so), remembering also not to include contact details for referees without their prior agreement.

Due diligence

Due diligence will be carried out as part of the application process, which may include searches carried out via internet search engines and any public social media accounts.

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