



Executive Director of Finance and Resources

**Executive Director of Strategy, Involvement and
Growth**

Candidate Information Pack

April 2024.



Introduction from our Chief Executive

Hello! Thank you for your interest in our current recruitment campaign. I am Karen, the Chief Executive at Locala. We are a social enterprise delivering services across West Yorkshire and Manchester with over 1400 dedicated colleagues. Our goal is to be a lead provider of health and care services for people in their own homes and communities.

Our services have been rated as good or very good by 95% of patients and service users, which makes us proud of our work. As a social enterprise, we have the flexibility to invest in our services and communities, making a real difference to people's lives.

We have recently launched our Thrive Strategy, which aims to support people to thrive in the places they live. We are looking for two outstanding leaders who can help us reflect our values and reach our goals by providing better care every day and serving more communities.

We need creative and opportunistic people who can support our colleagues and the people we care for by moving our services forward. Our executive team works hard together and is supported by a committed board, members' council, and representatives of our communities.

We are excited to work with you to help us deliver on our strategy and make a real difference in the world.

We look forward to speaking to you soon!

Kind Regards

Karen Jackson
Chief Executive



About us

What we do

Locala Health & Wellbeing is proud to be a leading provider of publicly funded health and care services in communities across West Yorkshire and Greater Manchester.

As an independent not-for-profit social enterprise, we possess operational, legal and financial flexibility so we can tailor our services to meet the needs of our communities – and any financial surplus is re-invested straight back into supporting patient care, and our communities through Social Value initiatives.

We're here for people at all stages of their life. Our services range from health visiting to district nursing, sexual health, school nursing, physiotherapy to end of life care. Plus, dental care and podiatry. Our colleagues always aim to provide high-quality, value for money care and support people closer to home.

We work with GPs and other key partners including social care, local NHS organisations, local authorities, community pharmacies, social prescribers, patient groups and VCSE organisations to ensure a co-ordinated approach to health and social care services.

We are providing more services to more people and communities, including the expansion of our sexual health services into Greater Manchester, our self-care support and our outreach work into communities through our clinical van pilot project. Crucially, we have also successfully retained our largest community services contract which provides us with significant stability for the next strategic period.

Our new strategy outlines how we will develop by also providing self-funded health and care services to meet community needs, improve our financial sustainability and create growth opportunities. As an employer, our engagement scores continue to rise, with Locala colleagues now the most engaged of any provider in the region.

Our Vision and Values

Our Vision - As a social enterprise, we believe in supporting people to have better lives by investing all of our resources into local communities.

Our Values



Our Thrive Strategy



Locala's commitment to Equality, Diversity & Inclusivity

Locala embraces diversity and inclusion and strives to become an organisation that celebrates and values the individuality of our colleagues' lived experiences. Locala recognises the value that inclusivity brings when delivering equitable, high quality healthcare to our local communities.

We are committed to promoting inclusive practices in our day to day interactions with all our patients, carers, visitors and colleagues.

Our Inclusivity Steering Groups work closely with us to provide lived experience and advise as we focus on making positive change. The Inclusivity Groups cocreate our Action Plans and work with us to achieve the priorities outlined in those. Other groups, such as the Accessible Readers Panel help make sure that our information is accessible to everyone, patients, carers, visitors and colleagues alike.

Our Public Sector Equality Duty provides assurance to patients, service users, community members, members of the public and partner organisations that Locala is committed to equality and inclusion. This report provides an annual update of activity undertaken to embed equality within the organisation and its activities, as well as the organisational equality and diversity objectives for the next 12 months.

Locala is committed to meeting the requirements of the Accessible Information Standard, ensuring that we meet the specific communication needs of patients and their parents and carers. This will mean that patients can gain information they need in a way that they will understand, allowing to increase their own independence by self-managing conditions, making choices about treatments and procedures and just generally making decisions about their health and wellbeing. We encourage patients and carers to ensure that they discuss their communication needs with their clinician.

"Locala Health and Wellbeing is fully committed to inclusivity throughout our workforce and celebrating the diversity of our colleagues and communities. On a personal level as CEO, I have been involved in diversity work including Reverse Mentoring to learn more about the lived experience of Locala colleagues and get a better understanding of the issues people face. With the help of our Inclusivity Steering Groups we are consistently making positive changes to ensure better workplace experiences for each and every one of our colleagues and I hope you will join us in those efforts." –

Karen Jackson, CEO of Locala Health and Wellbeing



Our Chief Executive and Chair

Karen Jackson

Chief Executive

Karen Jackson has been the Chief Executive of Locala Community Partnerships CIC since April 2018. She is also a governor of a college in Doncaster and a Trustee of 2 local charities. Karen has significant leadership experience having previously acted as interim Chief Executive for Southport and Ormskirk Hospital NHS Trust. During her time at the Trust, she was responsible for delivering quality and financial improvements and driving a significantly improved culture around quality and patient safety, and staff engagement. Previous to those roles, Karen was an Improvement Director with NHS Improvement, where she was programme manager for the West Yorkshire Acceleration Zone, reporting directly to the Secretary of State. Before that, she was Chief Executive for North Lincolnshire and Goole NHS Foundation Trust, a complex acute and community healthcare provider with a turnover of over £300m. Karen led a quality improvement journey that resulted in the trust coming out of special measures.



Colin Lynch

Chair

As of January 2024, Colin is Locala's Chair. Prior to this, Colin has also been a Director of Locala since January 2020, and has also been our Senior Independent Director and Vice Chair. Colin has had more than 30 years of experience being on or advising Boards in the UK healthcare sector. Since 2021, Colin has been a Non-Executive Director of North East London NHS Foundation Trust, a major provider of NHS mental health and community services in South Essex, Kent and North East London, and in October 2023 Colin was appointed as their Senior Independent Director. From 1996 to 2017 he worked as a legal advisor with healthcare specialist law firm Capsticks and was their national lead on all commercial, corporate, and major project work. For the last 10 years, Colin has worked in consultancy. He led legal teams on many of the UK's largest and most complex healthcare transactions, many of them being firsts of their kind. Between 2018 and 2022 Colin has been running his own healthcare projects advisory consultancy. His clients include NHS providers, private sector healthcare businesses and national healthcare charities.



The Opportunities

Executive Director of Finance & Resources

Summary Job Description

Job Title:	Executive Director of Finance & Resources
Salary:	£120k - £140k plus (Dependent on experience) + Excellent Benefits
Reporting to:	Chief Executive
Base Location:	Headquarters (Batley)

Key Objectives

- Act as Locala's Lead on all matters finance, ensuring all statutory requirements are met in the management and reporting of the organisation's accounts.
- Drive the achievement of annual efficiency targets while upholding the financial sustainability of the organisation and facilitating strategic investments aligned with the growth strategy.
- Lead the development and execution of a comprehensive approach to Quality Improvement (QI), digital innovation, and process optimisation to deliver measurable enhancements in productivity and efficiency organisation-wide.
- Strategise and implement plans to enhance organisational productivity and efficiency, effecting tangible improvements to support financial sustainability and foster growth.
- Cultivate collaborative relationships across the system to identify, develop, and implement shared objectives aimed at enhancing delivery efficiency throughout the system.

Key Responsibilities

- Develop and articulate compelling organisational strategies aligned with industry best practices and regulatory requirements.
- Lead strategic planning efforts, fostering a culture of accountability and engagement at all levels.
- Cultivate partnerships to support organisational growth and system-wide service improvement.
- Act as Locala's Chief Accountant, ensuring financial sustainability while maintaining patient safety and care.
- Lead financial planning and budget management efforts, identifying areas for cost optimisation and revenue enhancement.

- Ensure compliance with financial regulations and oversee effective financial systems and controls.
- Develop operational strategies to streamline processes and improve service outcomes.
- Champion a culture of continuous improvement and innovation, embedding quality improvement principles.
- Lead transformative projects to drive sustainable change and service redesign.
- Identify and capitalise on business development opportunities in collaboration with executive colleagues.
- Lead the adoption of cutting-edge technologies and innovative solutions to enhance service delivery.
- Recruit, mentor, and develop high-performing teams, promoting a culture of collaboration and accountability.
- Provide ongoing coaching and professional development opportunities to maximise team potential.
- Promote equality, diversity, and inclusion (EDI) within the organisation.
- Implement quality assurance programs to maintain and enhance standards.
- Architect a vision for shared service delivery, ensuring efficiency and effectiveness.
- Lead workforce strategies supporting organisational goals and achievement of Investors in People Gold Status.

Full Job Description available on request.

Person Specification

	Essential Criteria	Desirable Criteria
Qualification / Training	Professional Accountancy Qualification Educated to First Degree level Post-graduate qualification or equivalent level of experience	
Experience	Successful track record in a Director of Finance role working at Board level Experience of establishing People strategies that align to business objectives Demonstrable experience of leading a People function	Significant experience of working within a mutual or social enterprise

	<p>Successful track record managing multi-disciplinary functions and teams, with a range of professional services</p> <p>Significant experience of working in a commercial environment</p> <p>Experience of designing corporate functions to meet organisational need</p> <p>Successful track record of implementing digital solutions to effect large scale transformation</p> <p>Experience of driving inclusivity through the provision of services and workforce development.</p> <p>Experience and proven track record of quality assurance development and large-scale service development and redesign</p> <p>Excellent understanding of negotiation theory and practice and ability to achieve exceptional results</p> <p>Experience of managing a team, including delegation and oversee of duties</p> <p>Experience of planning and organising a broad range of complex activities, formulating and adjusting plans to reflect changing circumstances</p> <p>Experience of developing strategic plans and ensuring delivery</p> <p>Experience of working with Stakeholders to develop performance improvement plans and to develop plans for innovation and opening up the market</p> <p>Proven ability to promote the organisation (especially its clinical work) effectively with external agencies and individuals (at the highest level)</p>	
Knowledge	<p>Demonstrable knowledge of CIC company structure and operating parameters</p> <p>Demonstrable knowledge of financial management and accounting principles</p> <p>Proven ability to operate and think laterally at a strategic level, including well developed political awareness</p>	<p>Wide knowledge of relevant governance agenda and frameworks e.g., demonstrable through regional/ national roles.</p>

	<p>Proven ability to assimilate and understand the work of the organisation, its policy context, operational issues and challenges.</p> <p>An ability to think quickly and respond to situations, identifying risks, proposing solutions and strategies.</p> <p>Well-developed communication and influencing skills, with the ability to motivate teams and gain consensus at all levels within the organisation</p> <p>Excellent analytical and evaluation ability, with particular emphasis on thinking clearly, creatively and strategically</p>	
Personal Attributes	<p>An ability to build excellent relations with a wide range of internal and external stakeholders and partners, engendering trust and confidence</p> <p>Resilient and tenacious</p> <p>Strong verbal and numerical reasoning skills</p> <p>Strong time management and prioritisation skills</p> <p>Good use of available information sources to enable efficient and effective planning</p> <p>Ability to work under pressure and to tight and often changing deadlines</p> <p>Ability to cope with rapid and sustained change and competing demands, managing priorities within tight deadlines</p> <p>Ability to convey sensitive information in a tactful and sensitive manner</p> <p>A leader with personal and professional credibility</p> <p>Confident and able to inspire confidence in others</p> <p>Innovative and imaginative</p> <p>Ability to cope with distressing and emotional circumstances in a sympathetic and understanding manner</p> <p>Strong sense of integrity</p>	

Executive Director of Strategy, Involvement & Growth

Summary Job Description

Job Title:	Executive Director of Strategy, Involvement and Growth
Salary:	£100k plus (Dependent on experience) + Excellent Benefits
Reporting to:	Chief Executive
Base Location:	Headquarters (Batley)

Key Objectives

- To function as our lead on all commercial matters, ensuring we are well positioned and capitalising on opportunity to deliver against our growth objectives.
- Lead on the growth and diversification of our commercial portfolio, creating complimentary income growth and positioning our services as class-leading quality and high-margin contracts amongst its competitors.
- Through our enterprise and organisational strategy, develop a dynamic and agile culture, demonstrably using our social enterprise status to further our commercial and growth objectives.
- Develop and implement our plans to increase colleague engagement and diversity, making us a leader amongst other community healthcare providers.
- Lead our ambition to have the most inclusive workforce of our peers in Community Health Care provision.

Key Responsibilities

- To develop the organisation's growth strategy identifying ambition for commercial growth, opportunity for increasing our client base and where gaps in the market present opportunity for future expansion.
- Conduct market research and analysis to identify growth opportunities and potential risks.
- Working collaboratively with other business areas, develop pricing strategies and models to maximise revenue while remaining competitive in the market.
- Lead the identification of potential new business and partnerships and ensure these are reflected in the organisations strategic / operational plans and their potential maximised.
- Develop brand and communication strategies as key enablers to Locala's growth ambitions.
- Develop strategic partnerships that contribute to Locala's strategic aims and provide presence and platform to the organisation.
- Contribute to the delivery of a compelling organisational strategy and vision, articulating this effectively at all levels of the organisation, aligning all activities with strategic goals.
- Lead the development and execution of strategic plans, ensuring they align with industry best practice, regulatory requirements, and the organisation's values.
- Develop partnerships that support Locala's strategic ambitions of growth and partnership with a full understanding of the current and developing system architecture.
- Promote equality, diversity and inclusion within the directorate's leadership team and across the organisation.

- Contribute to the setting, management, and monitoring of the organisation's medium and long-term financial strategies.
- Develop and implement operational strategies and business plans to enhance service delivery, streamline processes, and improve service outcomes.
- Recruit, mentor, and develop a high-performing management team, fostering a culture of collaboration and accountability.

Full Job Description available upon request

Person Specification

	Essential Criteria	Desirable Criteria
Qualification / Training	<p>Degree Level education, or possess relevant equivalent specialist skills, knowledge, training and experience.</p> <p>Post-graduate qualification or equivalent level of experience</p>	
Experience	<p>Successful track record of working Board level</p> <p>Experience of leading within organisations and particularly the development and implementation of strategies that have resulted in revenue growth, new services or Partnerships.</p> <p>Experience in delivering organisational growth and income diversification through service development, acquisition, partnership arrangements etc</p> <p>Experience of effective partnership working with other agencies, third sector and stakeholders.</p> <p>Revenue growth achieved through tendering and proposals, supported by the development of research to inform opportunity pipelines.</p> <p>Experience of commercial business development (including production of complex business cases).</p> <p>Experience of developing and managing measurable marketing, communication and engagement strategies that support and strategic objectives.</p> <p>Successful track record managing multi-disciplinary functions and teams, with a range of professional services</p> <p>Significant experience of working in a commercial environment</p> <p>Experience of designing corporate functions to meet organisational need</p>	

	<p>Successful track record of implementing digital solutions to effect large scale transformation</p> <p>Experience of driving inclusivity through the provision of services and workforce development.</p> <p>Experience and proven track record of quality assurance development and large-scale service development and redesign</p> <p>Excellent understanding of negotiation theory and practice and ability to achieve exceptional results</p> <p>Experience of managing a team, including delegation and oversee of duties</p> <p>Experience of planning and organising a broad range of complex activities, formulating and adjusting plans to reflect changing circumstances</p> <p>Experience of developing strategic plans and ensuring delivery</p> <p>Experience of working with Stakeholders to develop performance improvement plans and to develop plans for innovation and opening up the market</p> <p>Proven ability to promote the organisation (especially its clinical work) effectively with external agencies and individuals (at the highest level)</p>	
Knowledge	<p>Financially literate with the ability to critically review, challenge and effectively utilise financial information for decision making.</p> <p>Knowledge of the role and function of a CIC and statutory organisations and the principles of corporate governance.</p> <p>Good understanding of growth, procurement (TOMs, PSR), contracting and strategic planning processes.</p> <p>An understanding of how to apply measurable social value to support strategic objectives.</p> <p>Proven ability to operate and think laterally at a strategic level, including well developed political awareness</p> <p>Proven ability to assimilate and understand the work of the organisation, its policy context, operational issues and challenges.</p>	<p>Wide knowledge of relevant governance agenda and frameworks e.g., demonstrable through regional/ national roles.</p>

	<p>An ability to think quickly and respond to situations, identifying risks, proposing solutions and strategies.</p> <p>Well-developed communication and influencing skills, with the ability to motivate teams and gain consensus at all levels within the organisation</p> <p>Excellent analytical and evaluation ability, with particular emphasis on thinking clearly, creatively and strategically</p>	
Personal Attributes	<p>Able to grasp vague concepts, e.g., forecasting market changes, and able to translate concepts into strategies, objectives and plans.</p> <p>Ability to think innovatively and develop new ways of working, continuously striving to improve services, systems and performance, embracing digitalisation.</p> <p>An ability to build excellent relations with a wide range of internal and external stakeholders and partners, engendering trust and confidence</p> <p>Resilient and tenacious</p> <p>Strong verbal and numerical reasoning skills</p> <p>Strong time management and prioritisation skills</p> <p>Good use of available information sources to enable efficient and effective planning</p> <p>Ability to work under pressure and to tight and often changing deadlines</p> <p>Ability to cope with rapid and sustained change and competing demands, managing priorities within tight deadlines</p> <p>Ability to convey sensitive information in a tactful and sensitive manner</p> <p>A leader with personal and professional credibility</p> <p>Confident and able to inspire confidence in others</p> <p>Innovative and imaginative</p> <p>Ability to cope with distressing and emotional circumstances in a sympathetic and understanding manner</p> <p>Strong sense of integrity</p>	

Appointment Timetable

Closing date for applications: Midnight Monday May 13th 2024.

Final interviews: Thursday June 20st and Friday June 21st 2024.

For more information or an initial discussion please contact:-

For ED of Finance & Resources – Kevin Round on 07768 000420 or email kevin@seymourjohn.com

For ED of Strategy, Involvement & Growth - Jonathan Phillips on 07817 988490 or email jp@seymourjohn.com

To Apply

Please attach a CV and cover letter in support of your application to:

For ED of Finance & Resources – Kevin Round at kevin@seymourjohn.com

For ED of Strategy, Involvement & Growth - Jonathan Phillips at jp@seymourjohn.com

Please use the subject “Locala Application” in your email.

Any postal applications should be sent direct to:-

**Seymour John Ltd, The Whitehouse, Wilderspool Business Park, Greenalls Ave,
Stockton Heath, Cheshire WA4 6HL**