

Head of Finance – Job Description – Person Specification

- Salary: £55,000–£60,000 FTE (£44,000–£48,000 actual salary for 30 hours per week)
- Contract: Permanent
- Hours: 30 hours per week (0.8 FTE - flexible working pattern)
- Location: Hybrid – Birmingham / Remote Working
- Reports to: Chief Executive Officer / Finance Sub Committee
- Direct Reports: Finance Officer (1.0 FTE), Finance Assistant (0.8 FTE)

About Us

[Health Exchange \(HEx\) charity and its trading subsidiary Living Well Taking Control \(LWTC\)](#) are purpose-driven organisations committed to improving health, wellbeing and reducing health inequalities through prevention, behaviour change and community-based support.

Together, we deliver innovative health improvement, social prescribing and lifestyle intervention services that support tens of thousands of people each year. Working alongside the NHS, local authorities, Primary Care Networks, community organisations and national and international partners, we are helping to shape the future of prevention and population health.

With a combined annual income of approximately £7.5 million and a team of nearly 50 permanent staff, we are entering an exciting phase of transformation and sustainable growth.

As we continue to evolve, we are seeking an experienced and forward-thinking Head of Finance to provide strategic financial leadership across both organisations.

Job Purpose

The Head of Finance will lead and develop the finance function across Health Exchange and Living Well Taking Control, ensuring robust financial management, effective governance and long-term financial sustainability.

As a member of the Senior Management Team, the postholder will work closely with the Chief Executive, Director of Operations, Head of Growth, Service leads and Trustees to provide financial insight, planning and analysis that supports strategic decision-making, organisational development and future sustainability.

This role combines leadership with operational oversight and offers an opportunity to play a central role in shaping the future direction of two ambitious organisations committed to improving health outcomes and reducing inequalities.

Key Responsibilities

I. Strategic Financial Leadership

Lead the development of medium and long-term financial plans that align with organisational priorities and strategic objectives, providing high-quality financial advice and insight to the Chief Executive, Senior Management Team, Board of Trustees and relevant committees. Support strategic decision-making through robust financial analysis, forecasting and scenario planning, identifying financial risks and opportunities and making recommendations to strengthen organisational sustainability. Contribute proactively to organisational transformation,

continuous improvement and the successful delivery of strategic initiatives across Health Exchange and Living Well Taking Control.

II. Financial Management and Reporting

Lead all aspects of financial management across Health Exchange and Living Well Taking Control, ensuring the production of timely and accurate management accounts, financial reports and performance analysis. Work collaboratively with budget holders and senior managers to develop and manage annual budgets and reforecasts, while monitoring financial performance, cash flow and reserves to ensure robust financial controls are maintained. Oversee payroll, pensions and financial administration, and lead procurement activity and value-for-money initiatives that support the effective and efficient use of organisational resources.

III. Business Partnering and Strategic Support

Work closely with the Chief Executive, Director of Operations and Head of Growth to assess the financial viability of new opportunities, partnerships and service developments, providing robust costing, pricing and financial modelling to support bids, tenders and contract negotiations. Support the mobilisation, delivery and performance monitoring of contracts through high-quality financial reporting and analysis, while developing business cases and investment appraisals to inform strategic decision-making. Ensure effective financial governance, transparency and appropriate financial arrangements across Health Exchange and Living Well Taking Control, supporting the efficient operation of both organisations.

IV. Governance, Audit and Compliance

Ensure compliance with all statutory and regulatory requirements, lead the preparation of annual accounts and external audits, and act as the main point of contact for auditors and professional advisers. Maintain effective financial controls, policies and governance arrangements, oversee organisational risk and asset registers, and support the Board of Trustees and Audit & Risk Committee in fulfilling their responsibilities.

V. Systems and Continuous Improvement

Lead the development and continuous improvement of financial systems, processes and reporting tools, maximising the use of technology to enhance efficiency, accuracy and management information. Lead, motivate and develop the finance team, fostering a high-performing and supportive culture, while contributing positively to the Senior Management Team and promoting organisational values of collaboration, integrity, accountability and inclusion. Support organisational change and continuous improvement initiatives that strengthen performance and effectiveness across both organisations.

Person Specification

Criteria Area	Requirements	Assessed By
Essential Qualifications	1. Qualified accountant (ACA, ACCA, CIMA or equivalent professional qualification).	Application / Certificates
Essential Experience	2. Significant experience in a senior finance role with responsibility for financial management, reporting and planning. 3. Experience producing management accounts, budgets, forecasts and financial analysis. 4. Experience leading external audits and statutory reporting processes. 5. Experience managing financial controls, cash flow and organisational risk. 6. Experience leading and developing finance staff. 7. Experience presenting financial information to senior leaders, Boards or Trustees. 8. Strong financial modelling and analytical skills.	Application / Interview
Essential Knowledge and Skills	9. Excellent communication and influencing skills. 10. High levels of integrity, professionalism and attention to detail. 11. Strong understanding of financial management principles and governance requirements. 12. Ability to translate complex financial information into meaningful insight for non-financial audiences. 13. Strong organisational and prioritisation skills.	Application / Interview / Presentation
Leadership & Strategic Capability	14. Experience contributing positively to a Senior Management Team, building working relationships to achieve organisational objectives. 15. Experience supporting strategic decision-making through financial insight and analysis. 16. Ability to balance strategic thinking with operational delivery. 17. Ability to influence and challenge constructively at senior leadership and Board level.	Interview / Presentation
Desirable	1. Experience within charity, voluntary, healthcare, social enterprise or public sector environment. 2. Knowledge of Charity SORP and charity accounting requirements. 3. Experience supporting tendering, contract management or commissioned services. 4. Experience using Sage or equivalent financial systems. 5. Understanding of NHS, local authority or commissioned service environments.	Application / Interview
Presentation Exercise	Candidates will be asked to prepare and deliver a 10-minute presentation to the interview panel on a pre-defined topic	Presentation / Interview

Why Join Us?

This is an opportunity to join two ambitious organisations at a pivotal point in their development.

We offer:

- A flexible 30-hour working week.
- Hybrid and remote working arrangements.
- 27 days annual leave plus bank holidays (pro rata).
- A supportive and collaborative culture.
- The opportunity to influence organisational strategy and sustainability.
- Meaningful work that improves health and wellbeing and reduces inequalities in communities across the UK.

If you are an experienced finance professional looking for a role where you can combine strategic influence, leadership and social impact, we would love to hear from you.