

Part 1: Summary job details

Job title:	Head of Finance & Operations
Contract basis:	Full-time, permanent (35 hours per week), subject to satisfactory completion of six-month probation period
Reporting to:	Chief Executive
Direct reports:	Finance & Administration Officer
Based:	We operate a ‘mixed-mode’ working model, where staff work both from home and from our spacious offices in Westminster; details will be discussed with shortlisted candidates
Annual salary:	c. £50–55k p.a.

Part 2: Job description

Job purpose

Clergy Support Trust is the largest and oldest benevolent charity for Anglican clergy and their dependants. Founded in 1655 and with assets of over £120m, the charity provides financial grants and other forms of support to serving and retired ministers, ordinands, and clergy families. In 2020 we supported more than 1,300 individuals to the tune of over £2.6m. With a new brand and strategy in place, and a newly-appointed Chief Executive, the Trust is at a hugely exciting juncture, as it seeks to develop more and better programmes and partnerships, serving and supporting those who are, in their daily ministry, called to serve and support others.

As part of our ambitious plans, and following a decade of outstanding service from the current postholder, we are recruiting a new Head of Finance & Operations. She or he will be responsible for the charity’s support services, and a key member of the four-person Senior Leadership Team. The success and growth of our programmes depends significantly on the success of our operational functions, including finance, IT, HR, data protection, health & safety, and asset management, all of which will form key parts of this role. In particular, the postholder will be responsible for both the strategic and day-to-day management of our significant financial resources, for oversight of the charity’s Westminster premises and our portfolio of investments (both funds and properties), and for efficient, creative leadership of the entire support function for a historic, highly-regarded charity during an important period of development.

The Trust is privileged to help a large number of people, but we do so with an efficient, close-knit and dedicated team of just a dozen staff. The postholder will need to combine a ‘big picture’ mentality, and in particular to be capable of managing substantial financial reserves and processes, with a ‘hands on’ attitude where they are a doer as well as a thinker and a leader, and with a passion for the wellbeing of clergy and their families.

This is an exciting, leadership role, in a unique charity, at a particularly unusual time in our national and Anglican stories.

Part 2: Job description (continued)

Key responsibilities

Working closely with the Chief Executive, Director of Charitable Services, Head of External Relations and other staff, the Head of Finance & Operations will have the following key responsibilities:

1. Overall management of the Trust's financial resources and processes

- ➔ Maintaining accurate financial records for all the charity's activities which includes maintaining income & expenditure records and bank and grant reconciliations
- ➔ Providing the Chief Executive, SLT, Court of Assistants (Board of Trustees), and relevant committees (primarily Investment and Risk, Audit & Finance) with the information and necessary advice required for outstanding stewardship and management of the charity's finances
- ➔ Presenting to the Court and its committees, and keeping them informed of financial matters
- ➔ Preparing annual budgets, forecasts and longer-term financial plans
- ➔ Preparing monthly management accounts and monitoring performance against budget
- ➔ Overseeing the paying of weekly grants to beneficiaries in timely fashion, and recording the same
- ➔ Monitoring levels of cash balances for efficient cash management
- ➔ Recording donations, including for the annual Festival, and managing Gift Aid claims

2. Management of the Trust's financial reporting to both internal and external bodies

- ➔ Preparing accounts for approval by the Court and its committees
- ➔ Leading on the charity's annual submission to the Charity Commission
- ➔ Preparing the Annual Financial Statements and, with the Chief Executive, the Trustees' Annual Report and Accounts
- ➔ Lead responsibility for the charity's annual audit, including liaising with auditors and being their 'go-to' senior leader for questions and matters arising
- ➔ Preparation of financial papers and presentations for the Annual Assembly (AGM)
- ➔ Liaising with the Risk, Audit & Finance Committee chair, and preparing relevant papers for committee meetings

3. Overseeing the charity's investments (both funds and properties)

- ➔ Ensuring that the charity's considerable investment funds are well-managed, including by monitoring the performance of our four fund managers and associated processes
- ➔ Re-evaluating, with the appropriate committees, the overall and longer-term performance of those managers, and their portfolios
- ➔ Acting as principal point of contact for the fund managers
- ➔ Recording of investment transactions and dividends due
- ➔ All administration relating to the charity's small investment property portfolio, including recording of rental receipts and liaising with management agents with regards to rent reviews, tenancy renewals and lettings, maintenance and refurbishments, and sale of property.
- ➔ Preparing quarterly reports and relevant papers for the Investment Committee meetings and working closely with its chair to ensure suitable oversight of the charity's assets

4. Shared responsibility, with the Chief Executive, for the charity's HR function

- ➔ Overseeing staff payroll, pension contributions, and expenses
- ➔ Ensuring compliance with, and enacting of, HMRC submission requirements
- ➔ Supporting as required in the recruitment and induction of new team members

5. Overall responsibility for the Trust's IT and facilities management

- ➔ Ensuring that the charity's office and infrastructure are appropriate and well-maintained
- ➔ Working with the CEO to consider future use of our spacious Westminster offices as the team moves to a more flexible, 'mixed-mode' working culture post-pandemic

Job Profile – Head of Finance & Operations

- ➔ Managing all renovations and refurbishments to our principal office in Westminster, including oversight of tendering, project management, and performance of contractors against budget
- ➔ Ensuring that the charity's IT provision is fit-for-purpose, safe, secure, and regularly reviewed and updated
- ➔ Keeping up-to-date with key developments in cybersecurity, ensuring that staff are suitably informed and trained
- ➔ To lead in maintaining a positive health and safety climate, including ensuring compliance with regulations, making sure that communal spaces are safe for use post-pandemic, and risk assessing and reviewing procedures

6. Acting as the Trust's Data Controller

- ➔ Managing compliance with the 2018 General Data Protection Regulation, and any other regulations or legislation, and ensuring that systems are in place for this
- ➔ Reviewing the charity's Data Protection policies, and keeping staff informed of and trained in related areas

7. Line management of the Finance & Administration Officer

- ➔ Managing the full-time Finance & Administration Officer, whose wide portfolio includes office management, liaison with Trustees and supporters, events management assistance, secretarial support to the Chief Executive, financial processing, and administrative support to the Court and its committees
- ➔ Ensuring that the Finance & Administration Officer is happy, productive and effective in their role, that objectives are set and monitored, that development opportunities are considered and acted on, and the other core duties of a line manager

8. Other reasonable duties and projects commensurate with the post, including as a member of the Senior Leadership Team responsible for the charity's strategic direction and development

Part 3: Person specification

Attribute	Essential	Desirable
Experience, skills and abilities	<p>A qualified accountant with significant experience in managing financial resources, processes and reporting</p> <p>Understanding of investments and fund management</p> <p>Experience of complying with internal and external procedures and regulations, including HMRC, Charity Commission, auditors etc</p> <p>Experience in at least one non-financial area of the job description (IT, HR, property/facilities management, data protection) and a passion for learning and professional development</p> <p>Line or project management experience</p>	<p>Experience in a grant-giving charity or similar setting</p> <p>Experience as an Operations, IT or HR manager alongside financial responsibilities</p>
Personal	<p>A strategic thinker capable of seeing the ‘big picture’ and contributing to future vision</p> <p>A ‘doer’ who will get stuck in to the small-team, hands-on ethos of a busy charity</p> <p>A friendly, collaborative, good-humoured individual</p> <p>Ability to work effectively in a ‘mixed-mode’ setting with significant home-working</p> <p>Sympathetic to the Christian ethos of the charity, and with a passion for the wellbeing of clergy and their families</p>	

Attribute	Essential	Desirable
Education & training	<p>A qualified accountant with suitable registration and up-to-date training</p> <p>Evidence of ongoing professional development in finance</p>	<p>Evidence of ongoing professional development in non-financial areas of the role</p> <p>Knowledge of Sage software for accounting and payroll</p>

Part 4: Further job particulars

- Hours of work:** 35 hours per week, worked flexibly. The Trust's 'core hours' are 0900 – 1630, Monday to Friday.
- Pension:** The postholder will automatically be enrolled into the Trust's pension scheme, which attracts an employer contribution equivalent to 10% of basic gross salary.
- Death in service:** Life Assurance (Death in Service cover) of 4x salary will be provided for your spouse/dependants in the event of your death whilst you are an active employee of the Trust.
- Holiday:** The standard annual holiday entitlement in any holiday year is 25 days, exclusive of recognised public holidays. The Trust also closes between Christmas and New Year, additional to annual leave allowances.

Part 5: How to apply

To apply, please email the following to the Chief Executive, Ben Cahill-Nicholls, on ben.cahill-nicholls@clergysupport.org.uk:

- Curriculum Vitae.
- Covering letter (no more than two sides of A4) explaining why you are interested in the role and how you meet the person specification (please provide specific examples in your supporting statement).
- Completed copy of the attached Criminal Record Declaration form.

Closing date for receipt of applications: 1pm, Monday 26 July 2021

First-round interviews with members of the Senior Leadership Team will be held in early August. A shortlist of candidates will then be invited to a further interview, which will include members of the Court of Assistants (Board of Trustees).