

# Longleigh Foundation



# Finance Manager

Candidate Pack  
February 2019

**Please find enclosed:**

Background Briefing  
Job Description and Person Specification  
Application Form  
Timetable (please ensure you reserve some time on the interview dates)

**For background information on Longleigh go to**

[www.Longleighfoundation.org](http://www.Longleighfoundation.org)

## About us

The Longleigh Foundation is a grant-making charity and our social mission is **to provide funding that enables lives to be transformed.**

We were established by one of the UK's leading social housing providers, Stonewater, who recognised that the impact of public spending cuts and welfare reform was deepening the vulnerability and unmet needs of many of their residents and the communities in which they live.

In the face of cutbacks, and even the disappearance, of services from local authorities and charities our funding programmes support Stonewater residents on an individual basis as well as community-based projects that are addressing themes that may disproportionately affect people living in social and supported housing.

Our priority funding themes and groups are:

| Our priority themes   | Our priority groups                                      |
|---|--|
| Improving health and wellbeing                              | Young people, aged between 16-25                         |
| Overcoming social isolation and loneliness                  | Older people, aged over 60                               |
| Promoting inclusion (such as financial, digital and social) | People with a physical disability or learning difficulty |
| Improving community cohesion                                | People with poor mental health                           |
| Positive interventions that break negative cycles           | People subjected to, or at risk of, domestic violence    |
| Sustaining tenancies and independent living                 |  |

As we move onto the next stage of our development, which is to grow our overall fund size and to be as effective as we can in how we support people to apply for our funding, we are looking for someone to join us in this new role of Finance Manager.

Based in our Central London offices, this is a **21-hour per week post** (which could be worked over three or four days). But, as a charitable foundation with a national remit and due to the seniority of this role, **the ability and willingness to travel will be essential** to meet with a range of stakeholders, projects we fund or potential new donors to our fund.

## About you

**We are looking for someone who believes in our social mission and wants to be in a values-led working environment**, where our values of **transformative, passionate, aspirational, collaborative** and **agile** are truly lived.

**Our ideal candidate will radiate a personable but highly professional approach.** You'll recognise the critical importance of great financial management practices and have the skills and experience to ensure we get our funding delivered efficiently and effectively and to manage our resources as responsibly and as transparently as befits our privileged status as a registered charity.

This is not an entry-level role. **You will be an experienced and suitably qualified financial professional** with a clear understanding of the need to work right across the 'administrative - operational – strategic' spectrum as befits being part of a small and developing team. No job will be beneath you and no job will be above you in leading on how we look after our money and assets. You'll be involved in duties ranging

from processing invoices to preparing management accounts and from running payroll to playing a key role on tax and investment matters.

Whilst being a preference, you don't need to have experience within the charitable sector but you'll demonstrate the commitment and aptitude to learn about the legal requirements of managing and reporting on the use of charitable resources.

We're still a relatively new charitable foundation but we have some great momentum with us and we're growing and developing. So, this is a good time to join us and come on the journey to seeing the difference our funding can make in the lives of individuals and across whole communities. For the right person, we're a place where you can develop, have opportunity and a place where your ideas to improve how we transform lives will be embraced.

# Job Description

## Key information about the role

|                     |   |
|---------------------|---|
| <b>Salary</b>       | £40,000 to £50,000 (pro-rata)                   |
| <b>Hours</b>        | 21 hours per week (over 3 or 4 days per week)   |
| <b>Reporting to</b> | Longleigh Foundation Chief Executive            |
| <b>Holidays</b>     | 25 days per annum plus Bank Holidays (pro-rata) |
| <b>Location</b>     | Central London, Holborn                         |

## Immediate priorities in this new role

To-date, our financial services have been provided by our originating fund sponsor, Stonewater. As we move to our next stages of development, our greater independence from Stonewater is being embraced and this means that **an immediate priority for our new Finance Manager is to transition all our financial information from Stonewater to a new Longleigh financial management system.**

This transition process will involve very regular and close engagement with the Stonewater finance team over the initial few months in the role. This will require our Finance Manager to embrace travelling to meet with the Stonewater finance teams (in the main, in Reading and Bournemouth) and also have the resilience and positive, solution-focused approach to cope with the turbulence that can come with transition processes.

Alongside the engagement with the Stonewater team, **the second immediate priority over those initial months, is to identify a suitable financial management system for Longleigh to implement and to then set this up.** We will be looking to our new Finance Manager to choose a system that befits our activities, current and future scale and our reporting requirements.

## Main aims of the post

- Deliver an end-to-end (operational to strategic) financial management service for the Longleigh Foundation's operations.
- To provide high quality customer service to all stakeholders that includes Stonewater teams, funders, funded project representatives and other partners and suppliers.
- To support the Chief Executive and Board of Trustees in the fulfilment of finance-related regulatory requirements to ensure the transparent and prudent use of our charitable funds.

## Key duties and responsibilities

### Leadership and Strategy

- Be a champion and ambassador of the mission, values and vision of the Longleigh Foundation in all aspects of work and in all interactions with people.
- Develop financial strategies that are effective and efficient and in alignment with our culture and values.
- Support the Chief Executive and trustees, with sound financial advice, on Longleigh's investment considerations in order to ethically maximise returns on our assets that will be used to deliver our funding programmes over the long-term.
- Prepare accurate, reliable and timely reports for the CEO and trustees on financial matters.
- Develop and deliver Longleigh's financial activities from the strategic to the operational.

- Work with the CEO and others to ensure the financial growth of Longleigh in order to increase our ability to fund individuals in financial hardship and projects for vulnerable communities.
- Lead on risk management issues and ensure they comply with the Board's risk tolerances and appetites.

## **Financial Management and Delivery**

- Develop and deliver the day-to-day financial administration and management function for the charity.
- Ensure that Longleigh has financial policies and procedures in place that meet regulatory requirements and that fulfil best practice standards as befits our scale.
- Develop and maintain Longleigh's financial system to ensure up-to-date and accurate information exists at all times.
- Prepare accurate and reliable financial forecasts to support decision-making.
- Provide sound financial guidance on organisational developments and enable the organisation to undertake new projects.
- Ensure all financial requirements relating to individual and project grants are upheld, including meeting pay-out timescales for individual grants.
- Prepare monthly cashflow, income & expenditure and balance sheet reports.
- Play an active role in the preparation of annual budgets.
- Be the lead person in negotiating and managing contracts with suppliers to secure the best value for money for the provision of required goods and services to the charity.
- Work with the Company Secretary to ensure that all legal requirements of the organisation are fulfilled.
- Be the central point of contact for finance-related enquiries from all stakeholders and in resolving those enquiries.
- Manage the financial aspects of the Grants Programmes Administration Officer's workload.

## **General**

- Attend a monthly one-to-one meeting and annual appraisal meeting with your line manager to support you in fulfilling your duties and responsibilities and in your ongoing professional development.
- Attend required meetings (internally and externally) that support the development of the Longleigh Foundation team, and its ways of working, and the development of relationships with key external stakeholders.
- Attend identified training that will support you in fulfilling your duties and responsibilities, in ensuring that Longleigh meets legal and/or best practice standards or support you in your professional development.
- Follow all Longleigh Foundation policies and procedures and terms of your contract of employment.
- Undertake any other reasonable duties that befits being part of a small team or supports the fulfilment of the main aims of the post.

## Person Specification

| <b>Knowledge, qualifications, skills and experience</b>   | <b>Essential</b> | <b>Desirable</b> |
|---|------------------|------------------|
| Experienced finance professional, with senior experience, a suitable accountancy qualification or equivalent                          | ✓                |                  |
| Strong interpersonal and relationship building skills, able to relate to and empathise with all of our stakeholders and beneficiaries | ✓                |                  |
| Good working knowledge of the Charities SORP, charity trading and company law   |                  | ✓                |
| Experience of financial strategic planning and delivery   |                  | ✓                |
| Strong financial leadership and management skills   | ✓                |                  |
| Strong project and change management skills with experience of delivering projects on time and to budget                              | ✓                |                  |
| Experience of being a company secretary or an understanding of those duties   |                  | ✓                |
| Experience of managing risk and of advising others on risk  |                  | ✓                |
| Experience of supporting non-financial experts in finance   |                  | ✓                |
| Strong IT skills  | ✓                |                  |
| <b>Abilities and aptitudes</b>  |                  |                  |
| Ability to communicate clearly and effectively  | ✓                |                  |
| Ability to think clearly and strategically with strong analytical skills, able to synthesise new information quickly and accurately   | ✓                |                  |
| Creative in presenting financial information, clear and able to make financial information accessible                                 | ✓                |                  |
| Able to travel regularly  | ✓                |                  |
| <b>Personal qualities</b>   |                  |                  |
| Dynamic, energetic and forward looking  | ✓                |                  |
| Resilient, agile and patient, able to bring about transformation and change   | ✓                |                  |
| Committed to transparency and accountability  | ✓                |                  |
| Able to demonstrate a clear resonance with and commitment to Longleigh's mission, aims and values                                     | ✓                |                  |
| Passionate and driven to support Longleigh to grow and develop  | ✓                |                  |
| Highly developed sense of personal integrity with respect for others  | ✓                |                  |
| A team player who enjoys working in a small team and who appreciates that no task is beneath or above them                            | ✓                |                  |

## Timetable and how to apply for this post

|                                  |                 |
|----------------------------------|-----------------|
| <b>Deadline for applications</b> | 19 March        |
| Screening interviews             | 25 and 26 March |
| Panel interviews                 | 2 April         |
| Final interview                  | Week of 8 April |
| Decision made by                 | 12 April        |

To apply for this post, **please send your CV and a completed application form** to our recruitment adviser, Allyson Davies, at [Longleigh@allysondavies-consultant.com](mailto:Longleigh@allysondavies-consultant.com) by **no later than 10am on Tuesday 19 March 2019**.

The Longleigh Foundation is a company limited by guarantee with charitable status, registered in England & Wales.

Company number: 9923402

Charity number: 1169016

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