

Saxton Bampfylde



**affinitytrust**

Supporting people with learning disabilities

**Candidate Information**  
**Director of Finance & Resources**  
**March 2023**



## Welcome from our Chief Executive

**Thank you for your interest in Affinity Trust and joining us as our new Director of Finance & Resources.**

Affinity Trust has been supporting people with learning disabilities for over 30 years. We believe that everyone with a learning disability should receive the high quality, person-centred support they need to enable them to live their lives to the full as valued members of their community.

We currently support over 900 people with varied support needs and employ over 2,000 staff with an annual income of £59m. While operating very much as a charity, we obtain most of our funding through contracts with Local Authorities and, to a lesser extent, CCGs. Contracts are gained, predominantly, through competitive tendering.

Despite the unprecedented challenges of the pandemic, financially, we are in good shape. We have grown comfortably year on year and have strong reserves in place. Our growth has been based on a reputation for delivering quality support, focusing primarily on people with learning disabilities and committed to Supported Living as our model of choice. We have also recently been through a period of significant transformation and invested in new systems across the organisation to support more effective and digitally-enabled ways of working.



Like any care-provider, however, we are facing increasing challenge as our primary purchasers, local authorities, face increasing financial pressures driving down contract prices. We must continue to evolve to meet these challenges and remain a strong and trusted provider.

We are now looking for an experienced and commercially-minded Director of Finance & Resources to join Affinity Trust, who will bring energy and ambition to help drive the organisation forward. Responsible for Finance, People, IT and Property, this person will have a significant and wide-ranging role, supporting the Board, CEO and wider team to shape the future of the charity. This is an exciting opportunity to join an experienced and highly collegiate executive team to lead change and provide inspirational leadership to achieve our mission.

If you believe you have the ambition, ability and experience to take us forward, then we would love to hear from you.

With best wishes,

**Leo Sowerby, Chief Executive**

# What we do

We are dedicated to supporting people with learning disabilities to live the lives they want to. Whether helping someone to live in their own home, providing opportunities to make new friends, experiencing new things or gain work that is rewarding and enjoyable, affinity trust aims to ensure that those we support have the opportunity to live life to its fullest.

## Supported Living

Supported living is about supporting people to live in their own home, usually as a tenant, with their own rights to this home and with our support workers attending to support them to undertake normal community living. Affinity Trust supports many people with all aspects of their lives, including 24 hour support within their home and meeting sometimes very complex and specialist support needs. This is Affinity Trust's main model of support.

## Children and Young People's Services

Our community-based support allows young people to return to or remain in their own families and communities rather than being in residential care. We use the positive behaviour support model which develops a growth in confidence, self-esteem and independence, which in turn leads to a reduction in behaviours that challenge.

## Specialist Support

Affinity Trust works in partnership with commissioners, health professionals, individuals and family members to enable people with learning disabilities to move from hospital settings to live in their local community.

## Complex Support

Some people have physical disabilities or sensory impairments, or other chronic health conditions such as diabetes or dementia, or challenging behaviours in addition to a learning disability. We feel passionately that these specific needs should never be a barrier to someone leading the life they want, with the same rights and choices as everyone else

## Transformation Programme

We want to be as efficient and effective as we can and are undertaking a Transformation Programme to review all of our systems and processes in order to streamline them to remove duplications, save time and make our employees working life more focused on the people they support rather than time consuming management and admin processes.



# History, Mission & Values

Originally known as TACT (Thames and Chiltern Trust), Affinity Trust was set up in December 1991 to support people with learning disabilities who were leaving long-stay hospitals across Oxfordshire and Berkshire. We quickly came to specialise in providing high-quality, tailored support for people with complex and challenging needs.

Since 1991, we have grown steadily and now support over 900 people in 34 local authority areas across England and Scotland.

In 2009, we changed our name to Affinity Trust. By this time, we were supporting people with learning disabilities in many parts of the country, and our old name no longer reflected the reach of our work.

**Our mission is to enable people with learning disabilities to pursue active and fulfilling lives, gain increased independence and achieve equal rights as citizens.**

## Our values



**Committed** to doing our very best for the people we support and never giving up on someone we support.



**Inclusive** in how we value diversity, support equality of access to opportunities and challenge discrimination.



**Reliable** and always do what we say we will do.



**Respectful** of others, their views and their rights.



**Honest and open** in all of our relationships and transactions.



**Creative and flexible** in our thinking, in our work and in how we use our resources.

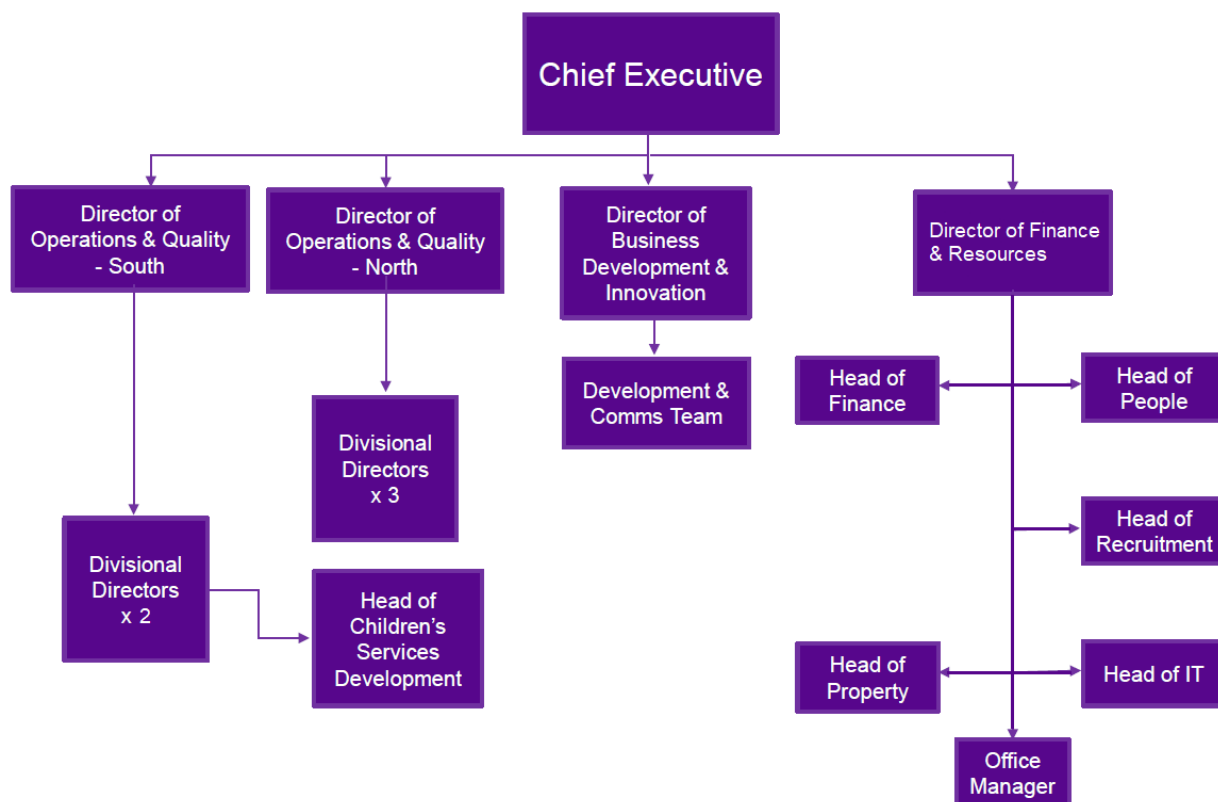


# The Role

We are looking to appoint a new commercially-minded and strategic Director of Finance & Resources who wants to be actively involved in growing Affinity Trust and leading the organisation through change. We are looking for someone who can think strategically and commercially but is also keen to make things happen personally and through getting the best out of their people.

Responsible for: Head of Finance, Head of People, Head of IT, Head of Recruitment, Office Manager and Head of Housing

Responsible to: Chief Executive



## The role responsibilities are outlined below:

### Strategy and leadership

- As a member of the Senior Management Team actively contribute to the long term development and success of Affinity Trust
- Play an effective role in the leadership of Affinity Trust across the organisation as a whole
- Lead the development of a trained and motivated workforce and good employee relations
- Ensure Affinity Trust's positive financial performance and sustainability

### Accounting and financial controls

- Support and advise the Board of Trustees and the Senior Team on Affinity Trust's current and future financial position and performance
- Oversee the continuous improvement of financial processes to achieve maximum efficiency and good practice
- Oversee the preparation of annual statutory accounts
- Ensure that Affinity Trust's financial affairs comply with relevant legislation and regulation
- Ensure that the finance team works closely and effectively with operational and other managers

### Treasury management and investment

- Oversee cash management
- Arrange cash flow forecasts and cash collection and debt
- Manage the investment of cash and surplus funds balancing optimal returns with appropriate risk
- Manage relationships with investment fund managers

### Budget setting and forecasting

- With the Head of Finance, plan the annual budget setting process working closely with the Directors of Operations
- Produce budget setting information
- Undertake periodic year end forecasts involving operational directors

### Reporting

- Ensure that the Head of Finance provides accurate and timely management accounts each month
- Ensure that the CEO, SMT, and Divisional Directors are provided with analysis and support from the finance team, including pricing and tenders
- Ensure the provision of periodic reports as agreed from time to time e.g. cost of agency staff, overtime, sickness absence, staff vacancies

- Presentation of financial reports to the Board and Finance and Audit Panel
- Organise and provide papers for the Board's Finance and Audit Panel
- Prepare and submit any regulatory reports e.g. CQC, Payment Practices Report.
- Lead on GDPR compliance
- Maintain the Risk Register and Mitigation Plan

### Workforce

- Maintain a cost effective recruitment function which meets the staffing challenges of operating in a low pay sector
- Provide training to staff which meets regulatory and legislative requirements and the particular needs of people supported by Affinity Trust
- Provide pathways for staff career development
- Maintain staff retention at rates typically better than sector averages.
- Through the Head of People, ensure the provision good employee relations advice and processes.

### Payroll/Pensions

- Ensure that the payroll department and systems work effectively with finance and HR
- Ensure that suitable software is in place to provide an efficient and effective process
- Review and approve year end tax and pension returns
- Manage relationships with pension and life assurance providers

### Information technology

- Provide leadership and management to the IT team
- Ensure that IT is effectively used to support and develop business activities and goals
- Ensure business continuity arrangements in the event of an IT system failure
- Management of Affinity Trust's intranet

### Housing

- Ensure that Affinity Trust owned properties are suitably managed and maintained
- Oversee any property transactions including lease arrangements
- Ensure rental income is maximised and appropriate internal charging arrangements
- Review and develop Affinity Trust's Housing Strategy

### Administration

- Manage the head office administration function
- Manage the head office premises



## The Person

We are looking to appoint an exceptional finance professional who brings breadth of experience, and a genuine passion for and commitment to Affinity Trust's mission. He or she will be a visible and active member of the Senior Management Team, providing inspirational leadership to the staff and contributing to achieving the Board's vision.

### Experience, skills and qualities

- A respected finance leader with a proven ability to make a substantive contribution to the financial success of the organisation
- Qualified accountant (ACA or equivalent)
- Ideally will bring additional experience in areas beyond finance, such as: HR, IT, digital, property, facilities management, legal, governance
- Able to lead the work required to recruit and maintain a trained and committed workforce
- Experience at Board or Senior Management level
- Strong commercial and financial acumen
- Experience of contracted services is desirable
- An ability to see the big picture and to contribute to Affinity Trust's strategy and development on the one hand as well as the ability to focus in on the detail on the other; ability to manage and interpret data to identify problems and solutions
- Flexibility of thought to work with a wide variety of business functions
- Ability to engage senior stakeholders and influence and negotiate effectively
- Collegiate and empathetic team player who is happy to roll up their sleeves as required
- A deep sense of personal integrity
- Robust and innovative, with high standards, and a sense of humour
- Excellent communicator at all levels
- A dedication to safeguarding and promoting the welfare of vulnerable people; a satisfactory Enhanced Disclosure from the DBS



## Terms of Appointment

Remuneration for this role will be agreed with the preferred candidate and includes a benefits package with a 6% employer pension contribution, private health insurance and a possible car allowance.

The role is based at our head office in Thame, Oxfordshire. We support flexible working and it is envisioned that this person will be a present and visible member of our executive team, in the office typically three days a week.

*We enjoy a diverse workforce and welcome applications from everyone. We're committed to being Disability Confident and we guarantee to interview all disabled applicants who meet the minimum criteria for the vacancy.*

## How to Apply

Saxton Bampfylde Ltd is acting as an employment agency advisor to Affinity Trust on this appointment.

Candidates should apply for this role through our website at [www.saxbam.com/appointments](http://www.saxbam.com/appointments) using code **YABASB**. We can also provide alternative formats for applications.

Click on the 'apply' button and follow the instructions to upload a CV and cover letter outlining why you want to be the next Director of Finance & Resources of Affinity Trust.

The closing date for applications is **Thursday 23rd March**.

### *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.*





Supporting people with learning disabilities

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Registered charity in England and  
Wales no.1139891 and in Scotland no. SC043881

