

Application Pack

Finance & Operations Manager



We want our application process to be right for you as an individual. If there's anything we can do to make the process below more straightforward for you, please email recruitment@barnwoodtrust.org and we will contact you to discuss what support we may be able to provide.

Our careers page on our [website](#) has some examples of things we may be able to put in place.

We are recruiting for:

- Full Time (37.5hrs per week), we will consider a minimum of 0.8 FTE (30 hours per week) appointment

The application pack consists of the following:

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After reading this pack, you will need to complete our online application form:

- Answer the 3-role specific competency-based questions.
- Provide your personal details, work history and experience.
- Please consider completing our equal opportunity monitoring section. Your equal opportunities information is separated from your application at source and is not seen by the recruiting manager.
- **Deadline for applications: 17:00 on Wednesday 2nd July 2025**
- **First interviews: Monday 14th July and Wednesday 16th July 2025 in the mornings**
- **Second stage interviews: Monday 21st July 2025**



Barnwood Trust

Barnwood is an independent charitable Trust. We get millions of pounds of funding out into the county every year. But money is only part of the story.

We join with the people, communities and organisations in Gloucestershire's disability and mental health movement – creating change so that disabled people and people with mental health conditions have choice of opportunities, access their rights, and are included where they live.

What do we do? We investigate the long-term, complex issues and barriers faced by disabled people and people with mental health conditions. We share research, develop projects, and run campaigns to influence the change that's needed. We partner with local organisations, involve people with lived experience directly in our work, and look for better ways to fund.

Barnwood Trust was set up over 200 years ago. Today, we are not your typical funder, and we don't work in isolation. Learning and collaboration run through everything we do. We bring people together for a different conversation and explore big ideas.

We listen and add clout where we can, to help make changes happen – building belonging and making a difference in the life of the county.

We are a mixed team of staff and Trustees at Barnwood with lived experiences of disability, mental health and neurodivergent conditions, and passionate allies in the disability and mental health movement.

Our Values

Focused



Disabled people and people with mental health conditions across Gloucestershire are at the heart of everything we do

Inclusive



Connecting and collaborating with openness and honesty, we ensure all voices are respected, heard and valued

Bold



In the face of change and uncertainty we are flexible and confident in finding ways forward

Forward Thinking



Using our independence, we explore long-term solutions to everyday challenges

Terms and Conditions



Full Time Permanent Contract

- We welcome applications from people looking for full-time hours (37.5hrs per week), we will also consider applications for part-time hours of at least 30 hours per week
- Salary £44,239 p/a FTE
- We offer a flexible start between 8:00 am and 9:30am Monday to Friday

This position is occasionally required to visit organisations around Gloucestershire. We would like candidates to hold a full driving licence and business cover on their car insurance. Adjustments will be made for candidates for whom driving creates a disabling barrier to conducting their visits.

Benefits

- 36 days holiday inc. bank holidays per annum (FTE)
- Life Assurance (3 x Salary)
- Pension Contributions
- Employee Assistance Programme

Due to the nature of its duties, this position is predominantly based in our office in central Cheltenham with only occasional and irregular opportunities for home working.

Barnwood Trust is committed to safeguarding and promoting the welfare of disabled people and people with mental health conditions and expects all employees to share this commitment.

All offers of employment are subject to several employment reference checks and a basic DBS check provided by the Trust.



Job Description

Purpose

1. To be responsible for the provision of effective financial management and control throughout Barnwood Trust, ensuring efficient processes and accurate financial reporting.
2. To provide professional guidance and support on financial matters to the Chief Operating Officer and Leadership Team on a timely and proactive basis to ensure the Trust is compliant with best practice and financial regulations.
3. To oversee the facilities management of the Trust's offices ensuring the premises and facilities operate effectively and safely.

About the role

The Finance & Operations Manager reports to the Chief Operating Officer and leads the Finance & Operations Team, having direct line management responsibility for the Finance Co-ordinator and Workplace and Facilities Manager.

The Finance & Operations Team sits alongside the Governance & Administration Team to form part of the Supporting Operations Function.

Financial Management and Reporting

- Provide the Chief Operating Officer and Leadership Team with accurate and comprehensive financial information reports to guide effective and sound financial decision making.
- Develop, implement and operate monitoring systems for financial forecasting and re-forecasting to support sound decision making.
- Lead on and co-ordinate the annual budgeting and planning process ensuring that information is collected, compiled and reported in a timely manner to the Leadership Team for review and recommendation to the Finance & Audit Committee.
- Produce quarterly and annual internal finance report and management accounts for reporting to the Leadership Team and Finance & Audit Committee, which summarise budget trends, analyse and report variance.

- Monitor financial activity against approved annual budget, reporting any anomalies or unusual activity to the Chief Operating Officer.
- Co-ordinate and produce year end Charity SORP financial statements, including the Trustee Annual Report, providing external auditors with the necessary documentation and support to audit the financial statements.
- Ensure compliance with all financial regulations, through liaisons with the Trust's external auditors for preparing of the SORP financial statements.
- Ensure all financial transactions, and approved annual budget, are correctly recorded in the Trust's accounting system (Sage 50 Accounts) and maintain good budgetary control of the Trust's finances.
- Provide monthly expenditure against budget reports to all budget holders and follow up queries as required.
- Attend quarterly Finance & Audit Committee meetings and take minutes of such meetings.

Policy and Procedures

- Establish and maintain good working relations with the Trust's chosen bank and external auditors and recommend any changes as appropriate.
- Collaborative with the Leadership Team to establish effective processes and controls to ensure efficient and effective financial management is delivered and maintained.
- Lead the development, implementation and monitoring of effective procurement policies, procedures and systems ensuring best value is achieved across all activities.
- Maintain the fixed asset register ensuring that appropriate insurance cover is maintained for all assets.
- Through regular liaison with the Head of Funding and Individual Grant Manager, ensure that all grant commitments are correctly recorded in the accounting system and static reports from the grants database are maintained for audit purposes.



- Lead on the annual insurance renewal process, ensuring appropriate cover is in place and general administration of the Trust's insurance policies is enacted.
- Ensure daily backup of the financial accounting system.

Payroll

- Ensure all payroll transactions are processed efficiently every pay period.
- Maintain payroll processing system and records by gathering, calculating and inputting data.
- Determine payroll liabilities, ensuring they are paid on time.
- Resolve all payroll queries.
- Develop and prepare ad hoc financial and operating reports as required by the Chief Operating Officer.

Facilities Management

- Support the development of a 5 year planned preventative maintenance plan for the Trust's premises, to support budget and resource planning.
- Oversee the management of the Trust's premises ensuring contracts are in place and appropriately managed to ensure the smooth running and maintenance of the building and that all health and safety requirements are met.

Line management responsibilities

- Provide line management to the Finance Co-ordinator and Workplace & Facilities Manager, enacting the Trust's management processes to ensure that all employees are motivated, supported and enabled to give of their best.
- Ensure that regular management reviews are undertaken with direct reports, providing open and honest feedback on performance, setting personal development goals and plans.
- Ensure that all direct reports work within clear and effective safeguarding practices and in accordance with all other Trust policies and procedures.



- Ensure that wellbeing, sickness and absence are managed effectively.
- Contribute to the design and implementation of team development work within the Finance & Operations Team in collaboration with the Chief Operating Officer.
- Contribute to Trust-wide people management policies, procedures and team culture as a member of the People Manger Team.

Safeguarding and Welfare

- Adhere to Safeguarding guidelines by following the Trust's Safeguarding policy and processes, escalating concerns to the Safeguarding Leads via the Safeguarding concern form. Share learning and best practice at Safeguarding drop-in sessions.

General

- Uphold, safeguard, and promote the Trust's values, principles and policies through personal conduct, approach to all tasks undertaken and conduct of relationships with everyone engaged with, inside and outside the Trust.
- Contribute to events and activities organised to support the development of Barnwood Trust and to promote the work of the Trust including the Trust's internal and external Learning Programme.
- Participate in routine tasks required to maintain a high-quality environment for everyone using Barnwood Trust's premises.
- Take responsibility for working in accordance with the Trust's policies, with special regard to the safeguarding policies, taking reasonable care for your own health and safety, and that of other people, and to comply with all health and safety legislation.
- Ensure the Chief Executive is kept informed of all important matters related to the work of the Trust across the county.
- Maintain confidentiality at all times and ensure compliance with the Trust's Information Governance Policy and suite of policies.

Person specification:



Commitment to disabled people and people with mental health challenges.

- Passionate about making a positive difference to the lives of disabled people and people with mental health challenges.

Education and training

- Qualified ACA, ACCA, CIMA or experience to this level (E).
- Specialist training relevant to disability and mental health conditions, including safeguarding, specialist communications or cultural awareness is welcomed for this role (D).

Essential Knowledge and Experience

- Practical knowledge and understanding of management accounting principles and techniques.
- In-depth knowledge of budgeting and financial forecasting and preparation of financial reports for senior management and compliance purposes.
- Line management experience to foster a productive and supportive team environment.

Desirable Knowledge and Experience

- Knowledge and understanding of charity accounting principles, standard accounting procedures and best practice.

Skills

- Strong numerical and analytical skills to effectively analyse financial reports.
- Proactive problem-solver, demonstrating high levels of initiative, organisation and flexibility.
- Ability to work meticulously and methodically, demonstrating attention to detail.
- Strong written and verbal communications skills that engage a wide range of audiences and which champion accessible communication



- Strong IT skills (demonstrable proficiency in using MS Office, Word, Excel, PowerPoint and Sage 50 Accounts) and the ability to use technology to achieve work plans and objectives.

Work ethic and approach

- A positive attitude and an ability to generate goodwill and build relationships with collaborators and colleagues
- Ability to manage parallel tasks, prioritise work, cope with the unpredictable and manage time effectively to meet internal and external deadlines
- Displays the utmost integrity and an ability to hold and respect confidential and sensitive information
- Dependable and resilient
- Commitment to working as part of a team
- Self-motivated, resourceful, and proactive in taking initiative
- Concern for, and commitment to, delivering high quality work



Guaranteed Interviews

In the person specification we describe some 'essential knowledge skills or experience' (a few things we really need the person applying to be able to do). If you have a disability (this includes mental health or long-term health conditions) and have these essential skills or experiences, we will guarantee you an interview*.

To be invited to interview or assessment in this way, you must detail in the answers to our 'Competency Questions' document how you meet the essential criteria for the role and then check the box next to the question asking if you would like your application to be considered for this.

A request under the guaranteed interview scheme does not guarantee an applicant a job. At interview, the best candidate will be offered the role. If you are invited to interview you will receive your invite and we'll ask you about any reasonable adjustments that you may need.

*Please note that if a large number of disabled people apply it may not be possible to interview everyone, in which case those who best meet the essential criteria will be invited to interview.

How to apply

On our website, click on Apply Now to be taken to the online application form. The online application form has 3 main sections for you to complete:

1. The form will ask you to answer 3 role specific competency-based questions. It is only your answers to these 3 questions that will initially be shown to the hiring manager to shortlist applicants for interview so please answer these questions fully.
2. The form will ask you to complete a basic application form including your personal details, work history and experience. This section will not be shared with the recruiting manager until after shortlisting and will be held by the recruitment team.



3. Finally, the form will ask you to complete an equal opportunity monitoring section. Your equal opportunities information is separated from your application at source and is not seen by the recruiting manager.

Equal Opportunities questions help us to monitor the effectiveness of our Equal Opportunities policy by gaining a picture of all those applying for and obtaining jobs with the Trust. The Equality Act 2010 protects people from discrimination and promotes equality based on a number of 'protected characteristics'. We ask for information on your 'protected characteristics' to help us monitor our performance on equality.

Completing the form

You may wish to complete your application in stages. To do this, use the 'save and continue later' function at the bottom of a page in the application. The form will ask you for an email address and will email you a link to the completed section of form so you can go back to it later even if you close your web browser.

Applications must be submitted by the closing date and time. Once you have submitted your application form you will not be able to make any further amendments, and you will not be able to see a copy. If you are invited to interview, we will share a copy of your application form with you.

- **Deadline for applications: 12:00 noon on Friday 4th July 2025**
- **First interviews: Monday 14th July and Wednesday 16th July 2025 in the mornings**
- **Second stage interviews: Monday 21st July 2025**