



**shaw  
trust**

**Chief  
Financial  
Officer**



# Welcome

Dear Applicant

Thank you for your interest in joining Shaw Trust as our new CFO.

Shaw Trust strives to create a future where good employment is accessible to all in society, irrespective of life circumstances. To this end, we focus on using our experience, skills, advocacy and passion to deliver the highest quality services for the people we support and to improve opportunities and access to work now and for the long term. We believe in the right of every person in the United Kingdom to live a decent and dignified life through good employment and our social enterprise seeks to improve life chances for employment for people who face social and economic challenges, or who may also be disabled or have complex needs.

We are a charity-owned large social purpose organisation of circa 3,000 employees, delivering services to our participants predominantly through delivery of large, complex contracts commissioned by Central and Local Government. To increase our income streams to enhance the impact of our work, we are increasingly exploring growth options using Business to Business opportunities. We regularly compete and partner with commercial firms to deliver the services we provide. Our last [impact report](#) showed that we worked with 335,000 people that year.

The scale of our business, and complexities of delivering value for money, require a strong and sophisticated finance function to drive our enterprise, lead financial planning, support strategy development and guide the Board on the forward development of the Trust and key risks. Also of critical importance is our approach to management accounts, linking our operational and financial performance and clearly explaining how the organisation is working.

To ensure we can draw on the right strength and calibre of professional advice, we're seeking a CFO to become the point of authority in relation to all financial matters and to provide support to the Board of Trustees and Executive as required. This is a critical Senior Leadership Team appointment, supporting and working alongside the Chief Executive, and contributing to the overall leadership of the organisation and delivery of the Trust's Strategy. You will work with a talented and diverse Board to advice and offer assurance across a wide range of matters.

We are looking for someone who can bring deep corporate experience gained as a very senior finance manager in another complex, largescale delivery environment. You will have natural leadership ability and appreciate the broader context and future for the Trust from a high level, strategic perspective. You will be able to link together the main themes and concepts, across a range of business areas, that come together to shape and enable our future impact.

If you believe you have the personal qualities, skills and experience we are looking for, I very much look forward to hearing from you.

**Chris Luck**  
Chief Executive Officer



# About Shaw Trust

At Shaw Trust we pride ourselves on our 'charitable heart with a commercial brain' approach to what we do; quality services that also maximise social value and social investment to communities.

This approach will allow us to meet:

## Our Vision

A future where good employment is accessible to all in society irrespective of life circumstances.

## Our Mission

To focus our experience, skills, advocacy and passion to deliver the highest quality services for the people we support and to improve opportunities and access to work now and for the long term.

Shaw Trust believes in the right of every person in the United Kingdom to live a decent and dignified life through good employment. We are a not-for-profit social enterprise that seeks to improve life chances for employment for people who face social and economic challenges, or who may also be disabled or have complex needs.

Today we are a charity that remains committed to employment as the core pathway to a better life. However, we recognise that access to good employment is critically dependent on what happens in people's formative years and the opportunities they then have.

## Our Services

Employability pathways and programmes are at the core of what Shaw Trusts delivers. Our framework to enhance contracted employability outcomes will include:

- Education and Skills.
- Children and Young People's Services.
- Health and Well-being.

## Our Ambition

Our ambition is to accelerate our mission and amplify our reach – by 2032, providing more people with the good help that they need to access good work and a good quality of life – and we need people like you to help us. For us, impactful change is about creating the conditions for this to happen, advocating and delivering services that make a real difference. Working in partnership not competition, we are part of an eco-system of purpose-led organisations, striving for a fairer, more equal society centred on opportunity for all.

Shaw Trust was founded on these principles over 40 years ago; for our 3,000 employees and 600 volunteers across the UK, they remain true. In the last financial year, we supported nearly 335,000 people through an annual revenue of £296m. We are now poised for the next era of significant development.

Our vision for the next 10 years is built on our Child to Career tenet focusing on joining up our nationwide, multidisciplinary skills and services to provide tailored, people-centred support without profit motive.

We will also use our deep experience to advocate on behalf of those in need. Our Shaw Trust Foundation uses surplus generated and donations to deliver positive change and our Shaw Trust Institute provides the essential evidence that helps shape national policy.

To help us deliver impact on the scale and of the quality we want to see, we are now looking for an individual with excellent leadership skills and a strategic mindset to be our new Chief Financial Officer.

To find out more please visit <https://www.shawtrust.org.uk/>

Please read our [Vision 2030 Strategic Directive](#) | Our [2022 Group Accounts](#) can be found here

# Main responsibilities of the role

<b>Job Title</b>	Chief Financial Officer (CFO)
<b>Reports to</b>	Chief Executive
<b>Location</b>	Hybrid, home working with regular travel into London and occasional wider UK travel to meet business needs

## Purpose

As a member of the Senior Leadership Team (SLT), the CFO will support the Chief Executive to contribute to the strategic leadership of the organisation and successful delivery of the Strategic Directive, as well as all aspects of organisational growth, continuous development and management. To be the point of authority in relation to all financial matters, and to provide support to the Board of Trustees and the executive team as required. To implement a new system of management reporting using current best practice to design management accounts for divisions and for the group, which link operational and financial performance, and which clearly explain how the organisation is performing. Lead the finance function.





## Main Duties and Responsibilities

- Assume overall control and provide leadership to the organisation in all financial planning, budgeting, transactional and reporting and ensure all financial systems and procedures are fit for purpose and embody best practice.
- Formulate and manage financial targets and budgets in accordance with the strategy determined by the board.
- Assume overall control of all finance function transactions and matters, including audit, quality and control systems.
- Ensure that Shaw Trust meets all applicable statutory and regulatory financial requirements.
- Support the Chief Executive and SLT to create an operational strategy for the organisation focusing on contract performance, income diversity and impact.
- Contribute to the overall management and strategic direction of the organisation, taking responsibility for corporate objectives and organisation-wide tasks as directed.
- Oversee the preparation of relevant, accurate and timely financial information, reports (including management and annual accounts) and forecasts to enable the Chief Executive, SLT and board of trustees to make appropriate decisions.
- Work collaboratively with the Chief Operating Officer to apply effective day-to-day governance of operational activity to ensure Shaw Trust meets its financial and operational Key Performance Indicators.
- To ensure that the key dynamics of the organisations that make up the Shaw Trust Group are clearly explained within financial and operational reports.
- Lead on the production of the annual budget, monitor performance against the budget and in liaison with Chief Operating Officer report to the board with recommendations for organisational solutions should adverse trends be identified.
- Provide effective liquidity management, ensuring cash availability for growth.
- Design, implement and facilitate the financial strategic plan, considering future business opportunities and collaborations with external organisations.
- Ensure all finance functions, including transaction processing, operate efficiently.
- Work with the SLT (and integration leads as appropriate) to deliver the expected financial outcomes of any mergers and acquisitions.
- Work with business development and operations to assist them with planning, analysis, modelling and forecasting of all business opportunities and evaluate their financial viability.
- Manage and develop relationships with appropriate professional advisers (including auditors and bankers) and relevant statutory and regulatory bodies.
- In conjunction with external advisers, ensure the organisation's tax and investment affairs are managed effectively and embed efficient and effective financial accounting systems, processes and internal controls.
- Understand and mitigate key elements of the organisations risk profile.
- Ensure funds are invested appropriately.
- Arrange for debt and equity financing as required.

## Leadership

- Commitment to the mission and values of Shaw Trust, demonstrating cohesive inspirational leadership as part of the SLT.
- Deputise for Chief Executive as appropriate and to work as part of the organisation's senior leadership team.
- Ensure the collation and distribution of performance data including narratives highlighting areas for improvement in relations to all service delivery within remit.
- Support the development of financial knowledge and understanding across the organisation.
- Be an ambassador for the mission and organisation with partners, stakeholders and commissioners.

This job description is intended to provide a broad outline of the main duties and responsibilities only. The post holder will need to be flexible in developing the role in conjunction with the line manager and may be asked to carry out any other delegated duty or task that is in line with their post.

# Person Specification

In your application, please refer to Part One of the Person Specification set out below. Part Two will be explored at interview for selected candidates

## Part One

### Knowledge and Experience

- Holds an appropriate professional qualification along with membership of a recognised accountancy body.
- Deep experience of leading teams as part of an SLT, of having supported and advised the Chief Executive and Board, and of having contributed to the overall management of the organisation.
- Significant and varied experience of leading a complex finance function to deliver high performance, and of handling largescale, complex and evolving budgets.
- Experience of working effectively to carry influence across a group structure.
- Track record of operating at Board level.
- Track record of successfully managing significant and diverse staff teams, and of ensuring compliance with corporate policies such as HR, Health and Safety etc.
- Strong experience of developing effective relationships with a range of stakeholders.
- Experience of reviewing and developing change management processes and of simplifying process and procedure to produce efficiencies and savings.
- Knowledge of the UK third sector.

## Part Two

### Skills and Behaviours

- Strong interpersonal skills with the credibility and personal impact and presence to establish credibility at board level.
- Secures confidence quickly and generates loyalty and trust across the organisation.
- Highly effective communication skills with the ability to convey clear messages, advise internal customers (including trustees) and challenge appropriately.
- Sharp commercial acumen and robust project management capability.
- High analytical capacity and is able to produce, analyse and critique complex financial information.
- Passionate about customer service and has a high degree of personal integrity.
- Able to balance commercial outcomes with charitable values.
- Persuasive communication and relationship-building skills and can work effectively with a board of trustees.
- Strong skills in organisation and prioritising.
- Comfortable with ambiguity and is decisive and resilient.

*This post requires a DBS check. The successful candidate will bring an awareness, understanding and commitment to the protection and safeguarding of young people and vulnerable adults.*

# Terms of Appointment

## Remuneration

This role attracts a salary of circa £160,000 per annum.

## Location

Hybrid (with UK wide travel).

## Employee benefits

Shaw Trust offers generous benefits listed below:

- 25 days annual leave (plus Bank Holidays), increasing to 26 days after 3 years, 27 days after 4 years and 28 days after 5 years' service
- 2 paid days volunteering leave
- Discretionary paid Christmas leave 3.5 days
- Option to purchase up to 1 weeks additional leave
- enhanced maternity, adoption, shared parental pay after 2 years' service; this is 14 weeks full pay and further 4 weeks half pay plus statutory entitlements
- two weeks of paternity leave with full pay
- enhanced pension (our provider is Aviva) after 6 months service, single matched contributions up to 6% of your basic pay (eg 6% employee, 6% employer, total contribution 12%). Our pension is salary sacrifice
- Life assurance at 3 x annual salary
- Healthcare cash plan for employee and up to 4 dependants (under the age of 18, or under 24 if in full time education) to claim back all or some of the cost of everyday healthcare expenses including dental and optical treatments
- Employee Assistance Programme (free and confidential support on a range of matters, and includes up to 8 structured telephone counselling sessions for employee, partner and certain dependants)
- Workplace savings via Cushon
- Shopping discounts and other savings (eg cinema discounts) via Vivup
- Gym discounts via Get Active with Aviva
- 30% off Microsoft Home
- Opportunities to connect with our employee diversity networks (LGBTQ+ Support Network, Racial Equality Network, Disability Equality Network, Women's Network, MANaging Network)

# How to apply for this appointment

We hope you will consider making an application to become our new CFO at Shaw Trust. To make an application, please go to <https://starfishsearch.com/jobs/shaw-cfo/> and click on the apply now button, with the following prepared:

- a CV (no more than three sides) or equivalent biographical information
- a short covering letter that explains your motivation and responds directly to Part One of the Person Specification
- please tell us if there are any dates during the selection process (outlined below) when you would **not** be available to participate.

We would also be grateful if you would also complete the anonymous Equality and Diversity monitoring form on the online application process. This form is for monitoring purposes only and is not treated as part of your application.

The closing date is **Friday 17th November 2023**.

## **Selection timetable**

First stage discussions for selected applicants will take place in **w/c 27th November 2023**.

Agreement of the final shortlist, and candidate notification, will be by **mid December 2023**.

Shortlisted candidates will be invited to complete psychometric testing in **December / January**.

Final stage interviews for selected candidates will take place in **early January 2024**.





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