



ST JOHN'S
FOUNDATION EST. 1174

HEAD OF FINANCE CANDIDATE RECRUITMENT PACK

Contact our recruiter Frankie Rose from Brewer Morris
frankierose@brewermorris.com
to find out how to apply.



A WARM WELCOME FROM OUR CEO, CATHARINE BROWN

This is a pivotal moment for St John's Foundation - you'll be joining us at an exciting time.

We're an organisation with more than 850 years of history, but what matters most right now is where we're going next. We're creating new almshouses, welcoming more people into safe, affordable homes, and strengthening our role as a leader in our sector. At the same time, we're investing in how we work - improving our systems, sharpening our operations, and making sure we're set up to deliver well, now and for the long term.

We're also on the move. Come April 2026, our team will be based in new offices at 1 Queen Square - a building that reflects who we are today: purposeful, ambitious and rooted in community.

We're looking for people who want to help shape what comes next at St John's. We're looking for colleagues who bring ideas, energy and care; people who are prepared to challenge how things are done, while staying grounded in what really matters.

Our values guide everything we do. Trust - in each other, and in the people we support. Courage - to make difficult decisions, try new approaches and keep improving. Kindness - because how we work matters just as much as what we achieve.

If you want to be part of an organisation that is proud of its past but firmly focused on the future - and where your work will make a real difference - we'd love to hear from you.

**Catharine Brown, Chief Executive
St John's Foundation**



ABOUT ST JOHN'S FOUNDATION

For over 850 years, St John's Foundation has been changing people's lives, for good. As one of the UK's oldest charities, we are proud to serve Bath and the surrounding area.

At the heart of our work is our almshouse community, where we provide housing for older adults in need. Alongside this, we run outreach services that help older adults in Bath and North East Somerset to live independently for longer.

With the expertise and resources we have built over centuries, we are now able to support even more of our community, which is why we offer direct help to people of all ages facing financial crisis. Our Crisis Programme provides people with essential needs, such as beds, white goods, furniture, counselling, debt support and basic employment skills and training.

Every aspect of our work is built upon our values of trust, kindness, and courage, and inspired by our purpose: to change lives. For good. It's a long-term strategy, but we're unwavering. After all, we've been around for over 850 years.



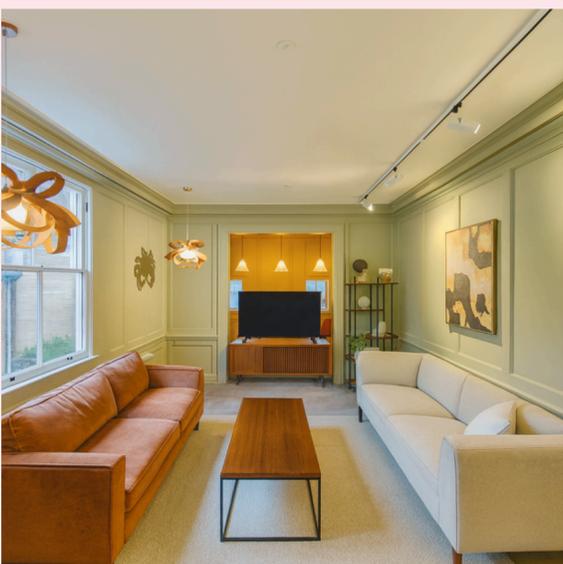
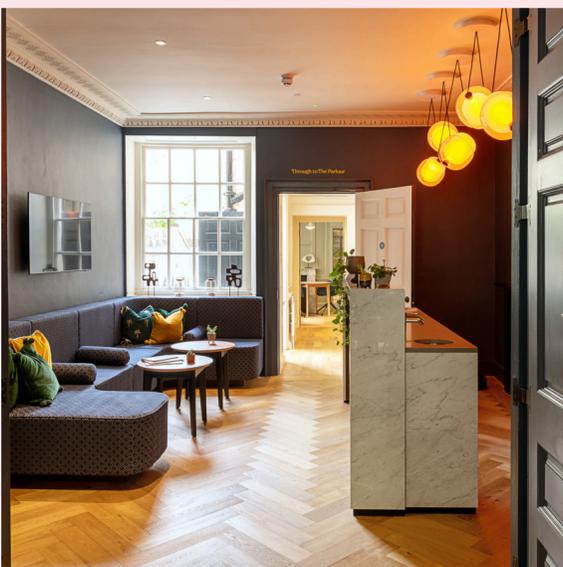
MOVING TO 1 QUEEN SQUARE

In 2026, St John's staff will move into the top two floors of 1 Queen Square. Refurbished in 2022 by the Charity's Trading Company, the House of St John's was created as a flexible, welcoming space for people to work, meet and celebrate. The building is home to co-working and dedicated desks, meeting rooms, event spaces and a relaxed members' bar. Thoughtful touches - including showers with complimentary toiletries, Dyson hairdryers and access to a courtyard garden - make it a place designed around people, not just desks.

Because of the building's character and setting, the House also hosts intimate wedding ceremonies on Saturdays, offering couples a historic yet contemporary space in the heart of the city.

As part of the move, St John's staff will be based on the top two floors, while the lower three floors will continue to operate as the House of St John's for members, clients and events. This ensures the building continues to thrive as a shared, purposeful space. The move is about more than a change of address. Relocating to Queen Square allows us to give up our existing offices, freeing up space to invest in new almshouses and welcome more older people into safe, affordable homes. It's a practical decision that directly supports our charitable mission.

Being based at 1 Queen Square reflects who we are today - ambitious, rooted in community, and focused on using our assets in the best possible way to support people across Bath.



JOB DESCRIPTION

Location: Bath (Minimum of 4 days in the office)

Hours of Work: Full-time 35 hours per week, Monday–Friday

Reports to: Director of Finance

Responsible for: Finance Business Partner

Contract: Permanent

Job Summary

The Head of Finance supports the Director of Finance in ensuring the financial health, compliance, and sustainability of St John's Foundation, its trading subsidiaries, and associated charities.

You will lead the day-to-day financial operations, oversee internal controls and reporting, and play a key role in the next phase of the new finance system implementation which will enhance efficiency and accuracy. Working closely with the Director of Finance, you will ensure that robust financial governance, accurate reporting, and effective systems underpin the charity's strategic aims and operational delivery.

This is a senior hands-on leadership role, managing the finance team and ensuring the Director of Finance, Executive Team and Board of Trustees are supported with reliable financial information and strong financial control.

Key Responsibilities

Financial Leadership and Control

- Manage the finance team in delivering timely and accurate financial processing and reporting.
- Ensure effective internal controls and procedures are maintained across all financial operations.
- Oversee cashflow, balance sheet management, and working capital requirements across the charity and subsidiaries.
- Review and approve key financial reconciliations, journals, and management information prepared by the team.
- Support the Director of Finance in maintaining and improving financial governance and risk management frameworks.
- Drive continuous improvement of financial processes and systems to enhance efficiency and control.

Investment Endowment Oversight

- Monitor and oversee the charity's investment endowment, ensuring compliance with agreed investment policy and risk parameters.
- Review investment valuations, income, and performance regularly, reporting to the Director of Finance and Finance and Investment Committee Trustees.

- Ensure proper accounting, disclosure, and reporting of endowment funds in statutory accounts and internal reports.
- Liaise with investment managers, advisors, and auditors to maintain effective oversight and governance.

Finance System Implementation and Process Improvement

- Manage the end-to-end implementation of the next phase of the new finance system, including requirements gathering, supplier liaison, system testing, data migration, and user training.
- Ensure the system integrates effectively with other organisational platforms where appropriate.
- Review and streamline financial policies, processes, and reporting tools to increase efficiency and control.
- Build financial capability across teams by training and supporting non-finance colleagues in effective system use.
- Ensure the system is embedded effectively, with optimised workflows and reporting capability.

Financial Management and Control

- Oversee day-to-day financial operations to ensure all transactions are processed accurately and in compliance with regulations.
- Maintain robust internal controls to safeguard assets and mitigate risk.
- Oversee cashflow management to ensure sufficient working capital across the charity and trading subsidiaries.
- Manage balance sheet integrity, including fixed assets, investments, restricted and endowment funds, debtors, and creditors.
- Oversee the maintenance of accurate accounting records and reconciliations.

Financial Reporting and Audit

- Oversee the preparation of accurate and timely financial reports for internal and external stakeholders, board reports, and statutory financial statements.
- Manage the annual audit process, liaising with external auditors and ensuring compliance with charity SORP and accounting standards.
- Support the Finance Business Partner in providing financial analysis, forecasts, and insights to support strategic decision-making.
- Monitor financial performance, identifying risks and opportunities for corrective action.

Compliance and Governance

- Ensure compliance with charity law, company law, HMRC, and relevant accounting regulations.
- Oversee submission of statutory filings to the Charity Commission and Companies House.
- Manage VAT, payroll, P11D, PSA, CIS, and gift aid returns and ensure timely responses to HMRC.
- Support the Finance Director in monitoring and mitigating financial risks, including investment and property-related risks.
- Maintain and update financial policies and ensure effective implementation across the organisation.

Stakeholder Engagement

- Provide clear, accurate, and relevant financial information to support decision-making by the Director of Finance and Senior Management Team.
- Act as a key point of contact for external auditors, tax advisors, and other financial partners.
- Liaise with HMRC and other regulatory bodies as required.
- Build strong working relationships across departments to promote financial understanding and compliance.

Team Leadership and Development

- Manage and develop the finance team (Finance Business Partner, Senior Bookkeeper and Junior Bookkeeper) ensuring high performance and accuracy.
- Allocate responsibilities effectively within the team to maintain robust financial control and efficiency.
- Foster a positive, professional, and collaborative team culture.
- Encourage continuous improvement, professional growth, and cross-skilling within the finance function.

Person Specification

Essential

- Qualified accountant (ACA, ACCA, CIMA, CIPFA or equivalent).
- Experience at a senior finance level, including responsibility for management accounts, budgeting, and statutory reporting.
- Proven experience leading or supporting a finance system implementation or upgrade.
- Strong technical knowledge of accounting standards and charity finance (including restricted and endowment funds).
- Experience in investment fund oversight, including valuation, reporting, and governance.
- Experience developing and maintaining financial controls, processes, and reporting frameworks.
- Strong leadership, communication, and organisational skills, with a focus on accuracy and integrity.
- Ability to work collaboratively under the direction of a Director of Finance, while managing operational responsibilities independently.
- Excellent communication skills and ability to work collaboratively with senior leaders and trustees.
- Advanced Excel and IT skills, with experience using accounting and reporting systems.

Desirable

- Experience within the not-for-profit or charity sector.
- Knowledge of property and investment accounting.
- Experience of leading digital or process transformation projects.
- Familiarity with modern cloud-based finance systems.

**Contact our recruiter Frankie Rose from Brewer
Morris on 020 7332 9639 or
frankierose@brewermorris.com
to find out more about to how apply.**



BENEFITS AT ST JOHN'S



Cycle to Work Scheme

We're proud to offer a Cycle to Work Scheme through BHN Extras, helping you save on bicycles and accessories while supporting healthy, sustainable travel. This salary sacrifice scheme allows you to spread the cost of a bike and equipment tax-efficiently, making commuting cheaper and greener.



Home & Tech Scheme

Get the gear you want for home or work with our Home & Tech Scheme from BHN Extras. Choose from a wide range of tech, furniture and more — all available through a salary sacrifice arrangement that can save you money on everyday essentials.



Private Medical Insurance

Your health matters — that's why we provide comprehensive Private Medical Insurance with BUPA. This benefit supports quicker access to medical specialists, diagnostics, and treatment when you need it most, giving you peace of mind and better control over your care.



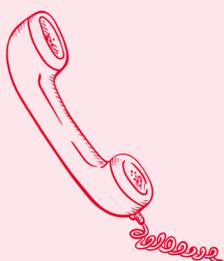
Life Assurance (3× Annual Salary)

We support your loved ones if the unexpected happens. Our Life Assurance benefit, provided by AIG, pays out a lump sum of three times your annual salary, helping to protect your family's financial future.



Salary Sacrifice Pension Scheme (10% Employer Contribution)

Plan for tomorrow with confidence. Our pension scheme, provided by Aviva, includes a generous 10% employer contribution via salary sacrifice — giving you a tax-efficient way to build your retirement savings and benefit from long-term financial security.



Employee Assistance Programme (EAP)

Life can be unpredictable — and support should be too. Through BUPA's Employee Assistance Programme, you and your household members can access confidential wellbeing services, including counselling, advice and resources for everyday challenges.



33 Days Annual Leave (Inclusive of Bank Holidays)

We recognise the importance of work-life balance. All employees receive 33 days of annual leave, inclusive of UK Bank Holidays, so you have plenty of time to rest, recharge and enjoy life outside of work.



**REGISTERED CHARITY 201476
ST JOHN'S FOUNDATION EST.1174
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PATRON: HER MAJESTY THE QUEEN**