

Independence at Home
Registered Charity number
1141758
Company number 7620400



Chief Finance Officer

Application Pack

September 2020

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1 Introduction, Background and Objectives

Since 1965 Independence at Home (IAH) has helped 46,000 people living at home with disability and long-term illness to gain greater independence and enjoy a better quality of life in their own homes and communities. These individuals are in dire financial need and have been helped by grants totalling £7.6M to live the life they want to live. Sometimes it does not take much to make a big difference which is where IAH's help comes in. In 2019/20 the charity made 1,200 grants. Modest in nature, with an average value of £365, each grant made an immediate and positive impact in one or more of the following areas.

- Special equipment for disability where the cost can be prohibitive
- Equipment to improve mobility which enables access to the world outside
- Home adaptations for accessible bathing and showering
- Essential household items such as specially adapted kitchen equipment
- Communications equipment for those with a visual or hearing impairment

Beneficiaries live all over the UK and are of all ages. They are referred by health and social care professionals and by trained workers from a range of charities and support agencies. All have tried, but failed to receive any support, or had sufficient assistance from statutory services to meet their complex needs.

We are open to innovative ways of meeting requests which may fall outside the guidelines set by statutory services but could make a tangible difference to a beneficiary's life. IAH also helps statutory services by contributing to the cost of a specialist piece of equipment which would not otherwise be possible due to tough pressure on public funding.

The charity's work is funded partly by income from investments. The charity relies on donations from about 100 charitable trusts and companies each year that are either unrestricted or support specific areas of activity, and occasionally legacies are received. There is no funding from government or statutory sources.

Currently the operational costs of the charity and its small staff team of five are funded from designated investment income from our Founder's Fund, supplemented by expendable endowment income. This ensures that all other monies received go directly to making grants or to specified projects. Headed by the Chief Executive, the team comprises the Chief Finance Officer, a Grants Manager, an Applications Officer and a Fundraiser.

Looking ahead to the future we are committed to making higher value grants and to helping more people gain greater independence and a better quality of life, wherever they live in the UK.



2 Achievements during the last year and response to Covid-19

In 2019/20 we planned to make 1,000 grants of average value £340 and total expenditure £340,000. We exceeded this and made 1,200 grants of average value £365 and total expenditure £437,813. We were able to do this because of the success of our fundraising particularly through increased support and multi-year grants from some of our main donors, including the Edward Gostling Foundation, the John Armitage Charitable Trust, the Dulverton Trust and the Mercers' Company. The total donations and legacies for the year was £406,934, £166,934 more than our fundraising target of £240,000.

IAH's first Fundraiser was appointed in September 2016. Utilising the proceeds of a substantial gift made by a charity which merged its resources with IAH in 2016, a ring-fenced amount was set aside to establish a fundraising function. We appointed a new progressive and accomplished Fundraiser in September 2019 with the intention of bringing in new sources of income from large size donors of £10,000 upwards. Successes this year have included a new unrestricted grant of £50,000, over two years, from the Schroder Charitable Foundation and a grant of £60,000, over three years, from the newly established Hargreaves Foundation, to increase the participation of children in sport and education.

Our recent fundraising success led us to increase our grant making plans and fundraising target for 2020/21. This year we plan to make 1,500 grants of average value £360 with total expenditure of £540,000 and our fundraising target is £471,000. Nearly halfway through our financial year we are on plan for grants and slightly ahead of our fundraising target.

The IAH team moved to homeworking rapidly and successfully with the outbreak of the COVID-19 pandemic and has remained fully operational since then. It is anticipated that homeworking will need to continue for some while yet, although the Harrow office is available for individual members of staff who wish to work there on an occasional basis. All of our donors were made aware of IAH's response to the pandemic, with several additional donations forthcoming as a result. IAH was one of the few charities that continued to operate at the outset of the pandemic, and we saw a rise in demand for assistance which has continued to increase.

People living with disability and long-term illness have become more vulnerable in our communities due to increased isolation and lack of health and social care support as a result of COVID-19. They are specifically and disproportionately affected by the social distancing and isolation that we are facing as a general population. Many are entirely cut-off from families, schools, daily activities and friends who used to provide regular support. IAH is determined to maintain a high level of grant making to increase our response to individual in need during these

difficult times. We are doing well so far this year in the level of donations and investment income but will be challenged by possible future reductions in our two main income streams.

3 Finance Function

The Chief Finance Officer is a critically important member of our small, friendly and professional staff team. You will work closely with and report directly to the Chief Executive and take responsibility for all of IAH's financial matters from preparation of the budget and annual accounts through maintaining full financial records and regular management reporting to paying staff and suppliers. You will act as advisor to the Chief Executive and the Board and works closely with the four Directors who are members of the Finance Committee, the charity's two investment managers and our external auditors. You will take the lead in reviewing and developing financial strategies and policies and procedures for effective governance of IAH and acts as Project Manager for key areas of development of the charity's work in agreement with the Chief Executive. Examples of such projects over the last several years include introduction of Salesforce for grant making and fundraising, merger with another charity and implementation of data protection policies and procedures.

The Chief Finance Officer will be an excellent communicator and team player supporting other members of staff as required, for example, working with the Fundraiser on the preparation of customised financial information for some major appeals to charitable trusts and foundations.

Experience of working in similar organisations is not necessary. What is critical is the ability to transfer skills and experience learnt in other situations to fit IAH's needs, to assimilate new information and requirements and put this to good use and implement, adapt to new ways of working, and to operate in ways that gain the confidence of IAH Directors and staff colleagues.





4 Job Description

Independence at Home is a small but growing UK charity making grants to people with a disability or long-term illness who are in financial need. The grants go towards the purchase of specialist mobility and disability equipment, home adaptations and repairs and essential household goods to improve independence, enhance quality of life at home and reduce isolation.

Job Title Chief Finance Officer (CFO)

Job Purpose The CFO will report directly to the Chief Executive Officer (CEO) and will take responsibility for all the Charity's financial matters, including maintaining full financial records, preparing annual accounts and acting as advisor to both the CEO and Board, through management of the Finance Committee and regular management reporting. You will take the lead in reviewing and developing financial strategies, policies and procedures where appropriate, contributing to the planned future growth of the Charity.

Hours of Work The post holder is required to work 11 hours a week, on Monday (9am-2.30pm) and, ideally, Tuesday (9am-2.30pm). Additional hours may be required at key times of the year, for example during the annual audit process.

Annual Leave 5.6 working weeks in addition to public and Bank holidays.

Salary Pro rata to c£40,000 p.a. for 11 hours pw

Responsible to Chief Executive

Liases with Applications Officer, Grants Manager, Fundraiser, IT and Database Consultant (freelance)

Location Independence at Home's office is in central Harrow

Main Duties

1. To advise the CEO on financial matters
 2. To maintain the financial records of the Charity, including exercise of appropriate controls and reconciliations between the accounting records and Salesforce
 3. To prepare annual accounts for audit, with all necessary back-up schedules and papers
 4. To process and maintain payroll records and pay monthly salaries, including processing staff pensions
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5. To process PAYE and any Corporation Tax returns as required, claim Gift Aid and prepare any other schedules/reports required by HMRC
6. To make all necessary filings in connection with the Charity's financial records including to the Pensions Regulator, Charity Commission and Companies House, in coordination with the CEO and auditors
7. To prepare a funds update at the beginning of each week to inform grant making
8. To arrange for payment of suppliers or referrers' organisations by cheque or BACS transfer in coordination with other members of staff
9. To liaise with the Charity's auditors, bankers, investment managers, landlord, insurers and other professional advisors
10. To take the lead in developing financial strategies, policies and procedures where appropriate for governance, risk, growth and financial probity
11. To attend meetings of the Finance Committee and Board during the year, acting as coordinator and secretary to the Finance Committee and secretary to the Board
12. To prepare and report on the annual budget for the charity, including monthly management reports to the CEO and Board
13. To make recommendations to the Chief Executive on improvements to IAH systems and processes, including working on ad hoc projects relating to potential mergers, policies and governance of the Charity, and to provide relevant information/advice as required to the Charity's Fundraiser
14. To undertake any other administrative duties, as required by the Chief Executive and by mutual agreement, from time to time.

Special Requirements

Sensitive information is held as part of the Charity's activities. An understanding of the principles of confidentiality is therefore vital, and the post holder is expected to act with discretion and keep all information gained as part of their work strictly confidential at all times.

5 Person Specification

Skills and Abilities

1. Evidence of either academic or professional development relevant to the level and scope of responsibilities
2. Computer literate with experience and proficiency in Sage, HMRC/other payroll software, Microsoft Office, Outlook and Salesforce.
3. Excellent oral, written and interpersonal skills are essential.
4. Experience of working in a confidential office and/or charitable environment will be advantageous.
5. Experience of using online banking and associated security protocols around such processes.

Personal Qualities

1. The post holder will have an empathy with the work and purpose of IAH, be self-motivated and be able to work on their own initiative.
 2. You will be flexible and keen to work as part of a team.
 3. A willing attitude towards learning and undertaking training is essential.
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6 Competency Profile

	Expert	Advanced	Skilled	Competent
Building and maintaining relationships	X			
Communications and Influencing	X			
Personal Effectiveness	X			
Planning and decision making		X		
Specialist Knowledge	X			
Innovation		X		
Developing yourself			X	

7 Conditions of Employment

Qualifications

- Evidence of either academic or professional development relevant to the level and scope of responsibilities
- Desirable – Institute of Fundraising Certificate

The post is subject to a probationary period of six months. Outcomes and progress will be subject to regular review with the Chief Executive

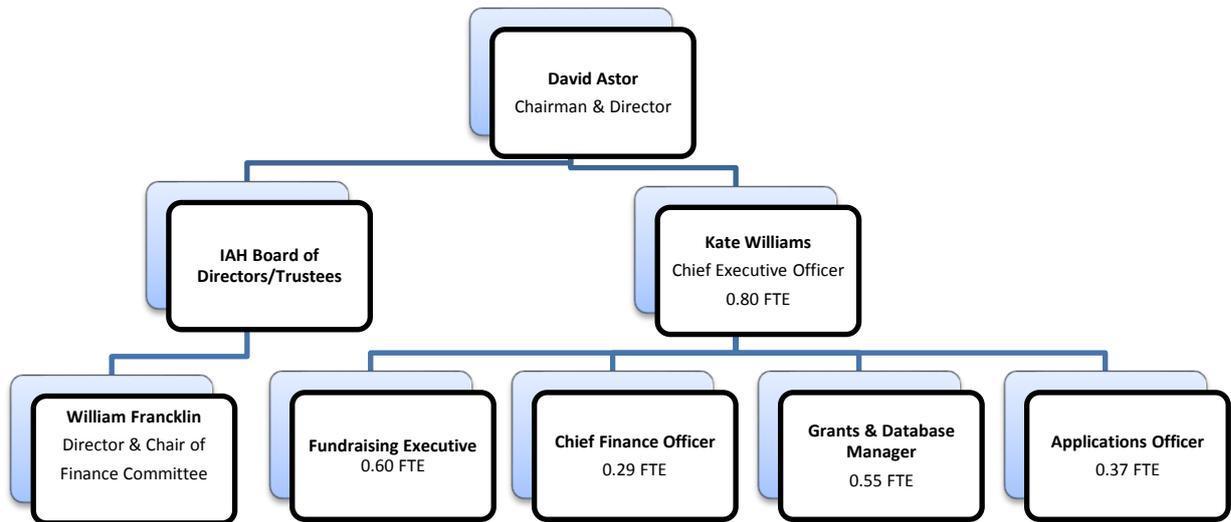
11 hours a week (Spread over 2 days)	Salary: c£40,000
11 days annual leave	Pension scheme available

Office location: The office is in Congress House, a modern serviced block within a five minute walk of Harrow on the Hill Metropolitan Line.

For more information about IAH visit: www.independenceathome.org.uk



8 Organisational structure



9 How to apply

Application is by CV and Supporting Statement

For an informal discussion, please contact Carroll Lloyd, Director: carroll.lloyd@nfpconsulting.co.uk

Closing date: 10.00 a.m. Friday 25th September 2020

First interviews: Tuesday 5th Wednesday 6th or Thursday 7th October 2020

Final interviews: Week commencing 12th October 2020

We seek to attract and employ the best people from the widest talent pool, as well as those who reflect the diverse nature of the UK society. IAH actively encourages a culture where people can be themselves and be valued for their strengths.

