



**Pilkington
Family Trust**

Head of Accountancy and Governance



About us

Formed in the 1920s we have a long history of providing services for retired Pilkington employees and their family members across the UK and overseas.

From our base in St Helens we support over 6,000 individuals, with our welfare and community support services focusing on supporting retired Pilkington employees and their families across the UK and beyond.

We deliver a range of social prescribing activities which provide practical and emotional support, promote health and well-being and tackle social isolation.

We offer specialist services including personalised respite care for beneficiaries and members of the community who are over 60 in our purpose built respite facility Ruskin Lodge in St Helens. We also deliver dementia support through our Admiral Nurse programme.



There to care when needed

How we make a difference

Our impact in 2023



Delivered

19,135

hot meals



Made

3,701

befriending telephone calls
on our link up service



Organised

27

social activities for people
living with dementia and
their carers



Organised

71

befriending telephone calls
on our link up service



Provided

462

respite stays at Ruskin
Lodge



Delivered

8,481

frozen hot meals



Carried out

4,797

welfare visits



Our Admiral Nurse made

245

visits



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Job description

Location: The Chambers, St Helens

Hours: 37.5

Reporting to: Chief Executive Officer

Salary: £55,000 – £60,000

Job Purpose

- Responsibility for the financial management and strategic financial overview of the Trust. You will contribute to the corporate needs and development of the Trust, with advice and input grounded in sound financial strategy and legal principles. You will maintain effective management systems and controls to safeguard the financial integrity of the Trust and ensure that all departments are promptly and accurately informed about their financial performance.
- Responsibility to manage and develop the Finance Function which is responsible for the provision of accounting and investment information and financial services.
- Plan with the CEO the resources required to support the Trusts activities.
- Service the Investment Committee including prepare, develop, and analyse strategic and management accounting information from our Investment Managers.
- Act as Company Secretary

Key Responsibilities

TRUST FUNDS

- Produce draft financial statements in accordance with SORP (other financial standards)
- Prepare for external audit and respond to all queries, including preparation of statutory accounts and act as lead liaison with auditors.
- Produce accurate monthly management accounts and reports to agreed timescales.
- Prepare month end and year end journals and adjustments including accruals and prepayments.
- Complete assigned balance sheet and restricted funds reconciliation.
- Ensure effective financial controls, procedures and policies are in place and adhered to within the Trust.
- To contribute to the Trust achieving Best Value through raising standards of performance and improving efficiency
- Ensure all statutory reporting of financial information is completed within the required timeframe and conforms to the appropriate legislation.
- Control the preparation and completion of annual budget information.
- Attend Trustee meetings in an advisory capacity, and to provide them with regular financial reports and advice on corporate issues.
- Support the development of the Trusts strategic plans.
- Develop and maintain relationships as appropriate, between PRSL and external organisations, such as the Inland Revenue, Investment Managers, auditors and our banking provider.

FINANCE FUNCTION – MANAGEMENT

- Support the finance team in the implementation and management of new finance systems.
- In response to the company business plan set out objectives for the year and financial implications and to communicate them to staff, ensuring all are aware of their responsibilities in achieving the objectives.
- Recruit, train, develop and lead the Finance team, according to PRSL policies, ensuring succession is provided for key roles.
- Carry out annual appraisals, identifying training and development needs in conjunction with the HR team.
- Undertake return to work interviews for team members returning from sick leave.
- Ensure team are aware of their responsibilities under the Health and Safety at Work Act and conduct their work accordingly.

FINANCE FUNCTION – OPERATIONS

- Conduct internal financial audits.
- Support budget holder in preparation of annual budgets and forecasts
- Identify key trends in income and expenditure by department/activity programme and report significant variances from budget with Managers.
- Liaise with senior managers identifying potential problems or opportunities, ensuring that financial resources are available to effectively support the business activities and projects.

- Investigate unusual or unexpected department/activity results or variances and bring to the attention of CEO.
- Support CEO and departments in ad-hoc projects and analysis exercises, including business case preparations.
- Ensure the finance team carries out financial tasks in an effective, efficient and timely manner.
- Continually review existing financial and management information systems and ensure systems are fit for purpose.
- Ensure the PRSL payroll is organised, and employees are paid according to the agreed structure and within statutory requirements. Ensure that all legal requirements are compliant such as PAYE, Annual Returns, National insurance, Pension Scheme payments into both our designated DC pension scheme and the PSS (closed) scheme and any auto enrolment requirements.

INVESTMENT

- Attend and organise meetings of the Investment Committee and provide relevant notes from such meetings to the chair.
- Manage the investment accounting information system and lead on liaison with external investment managers to obtain timely and accurate information.

GENERAL RESPONSIBILITIES

Represent PRSL on National and Local Organisations, as agreed within PRSL.

Ad-hoc accountancy support is provided to 3 smaller local charities The Rainford Trust, St Helens Housing Association Trust and The Pilkington Glass Collection.

Other duties as may be required by the organisation in the context of the Job Description.

Person Specification

Qualifications	Essential	Desirable
CCAB, ACCA, ACA or CIMA accounting qualification with evidence of continued professional development.	E	
Educated to degree level		D
Experience		
Minimum of three years leadership experience of strategic financial planning and implementation including management of resources as well as forecasting.	E	
Experience of collating financial data, research and presenting written reports	E	
Preparing/presenting documents, reports and procedures appropriate for Board/Trustee level	E	
Demonstrable experience of overseeing the development and implementation of strategic plans and organisational change processes.	E	
Experience in educating and assisting non-financial team members in understanding financial systems		D
Developing and monitoring service KPIs including robust data management	E	
Proven track record in driving a culture of continuous improvement and best practice internal controls	E	
Experience of developing governance policies and procedures	E	
Experience in being responsible for governance activity, including liaison with the Charity Commission and servicing a Board of Trustees	E	
Strong knowledge of accounting principles, financial regulations and reporting standards, including SORP etc	E	
Proven ability to identify and implement improvements in financial and operational systems	E	
Knowledge of accounting for investments and benchmarking tools on investment performance		D
Experience of a variety of software accounting packages and excel spreadsheets.	E	

Skills		
Highly collaborative in approach, solution orientated, flexible and will try new things and support other members of the team when required	E	
Excellent oral and written communication skills, interpersonal and leadership skills	E	
Detailed record keeping and information management	E	
Knowledge		
Knowledge of Access Accounting and IRIS Payroll packages		D
Knowledge of data protection legislation	E	
Knowledge of the Adult Social Care Sector, SME's, Charity Sector		D
Qualities		
Ability to identify problems and solve them	E	
Proactive, resilient, and able to work under pressure and meet deadlines	E	
Positive service orientated outlook	E	
Self-confident with excellent interpersonal skills	E	
Committed to the work of the Trust	E	
Commitment to beneficiary focused service, delivery and ethos	E	
Able to demonstrate a commitment to equal opportunities, diversity, and inclusivity	E	

Application process

Interested candidates are invited to submit a CV and cover letter outlining their interest, suitability, and vision for the role, and how they meet the requirements of the person specification in detail by 5pm on **4th November 2024**. Interested candidates are encouraged to submit early applications as the application window may close sooner than **4th November 2024** if a suitable candidate is found. **Interviews will be held on the 14th and 15th November 2024**.

We would be looking for the successful candidate to take up their post **January/February 2025**

Pilkington Family Trust is an equal opportunity employer. We are committed to ensuring a fair and equitable recruitment process for all vacancies.

Please let us know if you require any reasonable adjustments in order to effectively access the recruitment process. If you would like any further information about the role or application process, please contact Kate Brown, HR Administrator who may arrange a conversation with the CEO.

Enhanced DBS check needed.



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