

Local Trust
trusting
local
people

Finance Business Partner

August 2024

How to apply



Dear applicant,

Thank you very much for your interest in this post. On the following pages, you will find details of the role and the selection process to assist you in completing and tailoring your application.

To apply, you should submit:

- An up-to-date CV which shows your full career history. We recommend that this is no longer than two pages.
- A supporting statement, with your name at the top of each page, explaining why you are interested in this role, detailing how you are a good candidate for this post and how you fulfil the person specification. Each section of the person spec should be addressed under clear headings. We recommend that this is no longer than two pages.

Please note that applications can only be considered if both a CV and supporting statement are submitted.

Due to the number of applications, we are only able to offer feedback to applicants who attend interview stage. Good luck!

Kind regards,

Alexandra Askew
Head of People, Governance and Resource



Welcome to Local Trust

Local Trust was established in 2012 to deliver Big Local, a National Lottery Community Fund programme which committed £1m to 150 local areas in England.

Big Local is one of the most radical and exciting grant programmes ever launched by a major lottery funder. Between 2010 and 2012, the National Lottery Community Fund identified 150 areas that had historically missed out on lottery and other funding. Each of those areas was allocated £1m of BigLocal funding. This could be spent in any way they chose, provided residents organised themselves locally to plan and manage that funding, involving the wider community in the decision-making process.



The programme was designed not just to provide funding for projects, but to do so in a way that would build community capacity, confidence and skills in the longer term. To accomplish this, Big Local is bottom-up and community-led; there are no top-down targets or centrally imposed delivery models. The rules, constraints and priorities that define Big Local have been for local people to decide. The timeframe extends over fifteen years, allowing communities to take their time, build confidence and skills, make decisions and deliver change, without the usual pressures to meet end-of-year spend targets or other arbitrary, bureaucratic deadlines.

To secure the funding, resident-led partnerships of local volunteers work together to form a common vision for their area and agree priorities, in order to make a difference to the things that matter most to their community. The outcomes set for Big Local at its outset were deliberately broad to provide maximum scope for communities to set their own priorities, and were as follows:

- Communities will be better able to identify local needs and take action in response to them.
- People will have increased skills and confidence, so that they continue to identify and respond to needs in the future.
- The community will make a difference to the needs it prioritises.
- People will feel that their area is an even better place to live.

To help them make the most of their opportunity, residents involved in Big Local are supported in developing and delivering their plans by an extensive programme of training, networking and light-touch, on-the-ground support provided by Local Trust and its partners.

Welcome to Local Trust

Local Trust is a dynamic organisation where you could have a substantial impact, helping to influence positive changes in policy and practice for the benefit of communities that consider themselves 'left behind' or forgotten.

You will be joining a team of enthusiastic and supportive professionals, who care about their work. It's a great atmosphere as there is a genuine buzz and momentum about what we are doing. You will get to see the impact that Local Trust is making on the ground, as well as the extent to which our ideas and learning are influencing policy and practice nationally.

We have put together this pack to give you a stronger sense of who we are and you can find out more at www.localtrust.org.uk.

Best of luck with your

application. Matt Leach
Chief Executive



About Big Local

Big Local is an exciting opportunity for residents in 150 areas around England to make a massive and lasting positive difference to their communities. These are areas that have significant challenges to overcome and are places that are likely to have missed out on funding previously. Big Local brings together all the local talent, ambitions, skills and energy from individuals, groups and organisations who want to make their area an even better place to live.

Underlying this is a belief that residents have a capacity and desire to drive change. That they can achieve lasting and positive results when supported by those they trust and respect; and that this can build skills; confidence; networks; relationships; and expertise in each community. Residents identify what matters most to them and can then take action to change things for the better.

Local Trust will distribute more than £1m to each of 150 Big Local areas over its fifteen-year lifespan. We commit our money at the outset, and then support local residents to develop their own plans to spend the funding in ways that they collectively agree will improve their local area and the lives of those living there.

But we don't just provide funding. As the largest and most broad-based place-based funding programme in the UK, we also look to share the evidence and learning from our work.

Between now and 2027, we will be investing significantly in events, research, publications and public engagement that contribute towards setting a new agenda around deprived communities.

Local Trust is registered as a charity (number 1147511) and as a company (number 07833396). Big Local Trust is registered as a charity (number 1145916)



Our staff structure

Telling the story of communities is the backbone of our team's work and a passion we all share. Unlike many organisations, our communications are not driven by fundraising or membership recruitment. Instead, our funding model allows us to focus on supporting communities in 150 Big Local areas and sharing learning from the Big Local programme to influence wider change. With growing political interest in levelling up, we believe there is an opportunity to shift power and resources to communities. Local Trust is in a unique position to demonstrate the value of this approach and win support for it.

About the finance team

The finance team is a central and integral function which provides financial management and support across the whole organisation.

We strive to enable excellent decision making and to facilitate people to work in the best possible way by ensuring our finance, are appropriate, clear, fit for purpose, and embedded in the organisation.

Our finance function is strong with a highly competent team, which is accompanied by active oversight from the board of trustees and in particular the finance and investment committee. As a spend out endowment it is crucial that we have a clear and deliverable plan for managing the resources available, and that enables the organisation to achieve the strategy.

Entering the final years of spending in our Big Local areas, we are working closely with colleagues across the organisation to provide the financial support needed to drive change. As Big Locals across England look to achieve the plans they have in place for their local communities, the finance team ensures that grant funding is delivered to them in a timely manner and provide management information on how funds are being committed and spent. We also manage the wider financial needs of the organisation as we interact with Big Local areas by providing advisory support, research, policy, communications and learning.

Our staff structure

About the role

Over the past three years, Local Trust has seen significant growth across the organisation, a more active and engaged board and higher levels of spend across the organisation. We expect that this increased activity will be sustained over the next financial year, as Big Local areas increase delivery in order to achieve their plans. To support this, the finance business partner role is an integral role to support the needs of the organisation.

The Finance Business Partner will provide dynamic financial support to Local Trust, working in a busy but friendly team of five with responsibility for financial management and reporting on Local Trust and its subsidiary Big Local Trust. Core to the role is working across the organisation with budget holders and the programmes team to support with various aspects of financial management including, business partnering, financial reporting, analysis, reconciliation, and monitoring.

The successful candidate will be a qualified or part-qualified accountant with significant demonstrable experience of working within a busy finance team, who is accustomed to working with senior executives and budget holders, providing accurate and timely management information. The role requires an individual who has experience working with spreadsheets and analysing large volumes of financial data.

If this sounds like the opportunity for you, please get in touch!

Our values

Most of the Local Trust team is based in our offices, close to London Bridge.

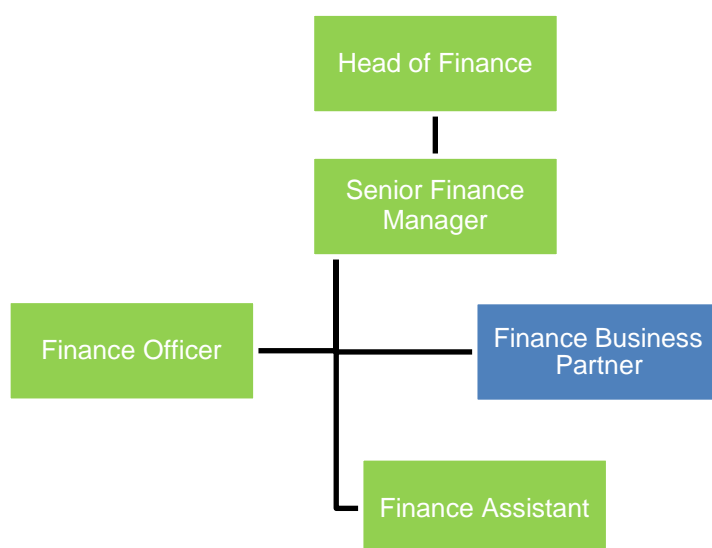
We also have a number of staff based across the country in various locations and currently operate a hybrid approach to office-working where full-time office-based staff spend 2-3 days in the office per week.

We are supported in delivering the programme by a network of local area coordinators who provide light touch on the ground support to our areas to help them deliver.

Click [here](#) for more information about our teams.



Organisational Chart (Finance Team)



Our values

Having the right experience, skills and knowledge as defined in the person specification is important; but so too is how you go about your work. As an organisation, we constantly challenge ourselves to be:

- *Responsive and engaged* - constantly seeking to improve the way we work to ensure we are providing Big Local partnerships with access to the support and assistance they need to achieve their ambitions.
- *Outward looking and partnership oriented*, prioritising building new collaborations and partnerships - both nationally and locally.
- *Focused on the future* - putting Big Local in context, and ensuring there is a Big Local legacy, both for areas and for the programme as a whole.
- *Proactive, questioning and challenging* - of both ourselves and Big Local areas, gathering evidence, evaluating approaches and learning from everything we do.
- *Influential, connected and informed* - valuing insight and analysis and actively informing and influencing wider debates on the future of communities.



Personal Specification

Job title	Finance business partner
Accountable to	Senior finance manager
Duration	2-year fixed term contract
Work hours	21.6 hours per week (0.60

FTE) Purpose of the role

To provide dynamic financial support to Local Trust, working in a busy team of five with responsibility for financial management and reporting on Local Trust and its subsidiary Big Local Trust. Core to the role is working across the organisation with budget holders and the programmes team to support with various aspects of financial management including, business partnering, financial reporting, analysis, reconciliation and monitoring.

Job description (key duties)

1. Provide financial administration including:
 - Providing business partnering support to budget-holders
 - Preparing draft monthly management accounts and other financial reports to the Senior Management Team (SMT)
 - Rigorous but targeted analysis of data to support decision-making
 - Managing financial records, keeping records up-to-date and ensuring processes have been well documented.
 - Monthly reconciliation of grant data between the finance system and grant management system, investigating and resolving discrepancies to ensure accuracy.
 - Monthly reconciliation of general ledger accounts to trial balance, investigating and resolving discrepancies to ensure accuracy.
 - Analysing the monthly pension liability data for accuracy and making submissions to Scottish Widows.
 - Liaising with SMT to complete quarterly performance monitoring reports.
 - Conducting internal audit of financial processes and recommend improvements.
 - Assisting with the review and update of financial policies
 - Supporting with the development of the finance system
 - Supporting the team with the annual audit process
 - Monthly processing of investment journals
 - Supporting the Finance Manager and executives with projects and tasks as required
2. Assist with the delivery of key finance tasks, including the provision of information for committees and board meetings, the annual audits for Local Trust and Big Local Trust, and the annual budgeting process.
3. Gather information and data, analyse and produce reports as necessary.
4. Act as a point of contact for financial queries, including dealing with queries from those we are funding in Big Local areas.
5. Develop effective working relationships with those we fund and support. This might involve visiting Big Local areas to build rapport, and therefore require travel away from the office.
6. Attend relevant training courses and maintain awareness of external affairs relevant to Local Trust.

Personal Specification

As a member of the Local Trust staff team, you will need to:

- Demonstrate Local Trust's vision and values in your daily work.
- Consistently contribute to organisation-wide learning, drawing on experience gained in your role, and similarly seek to learn from the work of colleagues to inform your work.
- Actively look outward and engage with the widest range of external stakeholders to influence, inform and excite others about the work of Local Trust and Big Local.
- Proactively support the development of a working culture that promotes equality and diversity.
- Help Local Trust deliver its environment and sustainable development policy and environmental management system.
- Be aware that you have a duty of care for the health and safety of yourself and others.

While these are your main areas of responsibility, no role profile can cover every eventuality. As this is a post in a small staff team, you are expected to offer flexibility as we may reasonably require you to support other tasks from time to time.

Personal Specification

	Criteria	Essentia/ Desirabe
Knowledge and experience	1. Proven work experience as a finance business partner, analyst or similar role	E
	2. Solid knowledge of financial and accounting procedures	E
	3. Experience and understanding of charity accounting and SORP	E
	4. Experience using financial software	E
	5. Experience of administering financial software and designing system reports	D
	6. Knowledge of financial regulations	E
Skills and abilities	7. Advanced Microsoft Excel skills	E
	8. Excellent analytical and numerical skills	E
	9. Excellent time management skills	E
	10. Methodical approach and attention to detail	E
Personal attributes	11. Strong ethics, with an ability to manage confidential data	E
	12. Excellent team player able to collaborate and support others	E
	13. Highly organised, comfortable managing concurrent projects and determining priorities	E
	14. Able to work flexibly and independently	E
Education and Training	15. BSc degree in Finance, Accounting or Economics	D
	16. Relevant professional accountancy qualification or part-qualification	E

Personal Specification

Pensions

- There is a salary exchange pension plan, with an employer contribution of 10%.

Hours

- The hours of work for this post are 21.6 hours per week (0.60 FTE) based around usual business hours. However, given the work of the organisation and the nature of the post, some flexibility will be necessary, including occasional evenings and weekend work. Occasional travel to Big Local areas will also be necessary from time to time.

Holidays

- 25 days' annual leave pro rata plus public holidays. Annual leave increases by one day per year, up to a maximum of 30 days after two years' service. Three additional days are also given for office closure between Christmas and New Year (subject to executive approval).

Benefits

- Staff benefits include excellent development opportunities, time off for volunteering (two days per annum), holiday sell-back and buy-back scheme, interest-free travel season ticket loan and a cycle-to-work scheme.

Probation

- This is a fixed term post and is subject to the successful completion of a 3-month probationary period. During this time your performance will be reviewed. At the end of the period, you will either be confirmed in post, the probationary period extended or in the case of unsatisfactory performance your employment will be terminated.

Notice

- During the probationary period, notice is one month on either side. After satisfactory completion of the probationary period, this will be extended to 2 months' notice on either side.

Location of post

- This post is based at our office near London Bridge, London. We currently operate a hybrid working policy, with full-time office-based staff required to spend 2-3 days a week at the office.