



**Gloucestershire**  
Wildlife Trust

## Head of Finance & Resource Planning

# Job description

We are now recruiting for a Head of Finance & Resource Planning to oversee and optimise the financial and resource planning functions across our organisation.

You will take overall responsibility for our financial controls and compliance, resource and portfolio planning and generating income from trusts and grants.

This is the senior leadership role within the function and as such you will ensure the seamless integration of the organisations strategic goals, ensuring that we have the financial resources to deliver our future ambitions.

### Job Purpose:

The Head of Finance & Resource planning is the senior leadership role responsible for overseeing and optimising the financial and resource planning functions of the organisation. This includes taking overall responsibility for GWT's financial controls and compliance, resource and portfolio planning, and generating income from trusts and grants. The role ensures the seamless integration of these functions to support the organisation's strategic goals, ensuring that we have the financial resources to deliver our ambitions over time, and achieve our financial net gain targets.

Salary: £50,000 per annum, plus Excellent Benefits

Term: Full-time Permanent, 35 hours per week (to include occasional evening and weekend working).

Responsible to: Chief Executive Officer

### Responsible for:

Senior Finance Manager, Finance Manager, Funding Development Manager, Finance Business Partner, PMO Manager

### Liaison with:

All staff, Senior Management Team (SMT), Board of Trustees







## Our purpose and values

As humans, we are an integral part of a resilient, dynamic and interconnected natural world. At Gloucestershire Wildlife Trust, we believe that nature holds the key to addressing some of the most pressing challenges facing society today. In responding to the ecological crisis, we share an urgent and collective responsibility for collaborating and taking action in the service of wildlife and communities.

We show how we care for nature, our partners and each other through our values:

- We are ambitious for nature and people
- We collaborate to achieve more
- We are dedicated to inclusion and nature for all
- We act with responsibility

We work locally to deliver the natural solutions, both small and large, from doorstep to landscape, that grow hope for a wilder future. In doing so, we are helping to reconnect people's sense of belonging in the natural world and securing nature's recovery with the people of Gloucestershire. Underpinned by evidence, our work is for the benefit of us all, both today and for generations to come.

## Job description







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# Introducing Gloucestershire Wildlife Trust

We are Gloucestershire Wildlife Trust – the largest membership organisation in the county dedicated to local wildlife. We own and manage more than 60 nature reserves across the county, all of which offer free access for visitors. 28,000 members in Gloucestershire support our work, with hundreds regularly volunteering time and commitment.

Our mission is a simple one – to value nature. Our ambition is to restore, recreate and reconnect Gloucestershire's wild places. We want everyone in Gloucestershire to value, enjoy and share the natural world.

Our priorities are outlined in our Strategic Plan: Wild Places, Natural Solutions - <http://www.gloucestershiREWildlifeTrust.co.uk/about-us/who-we-are/strategic-plan>

Our vision is ambitious, but we believe we can deliver it by:

- Creating bigger, better, more connected wild places where people and wildlife can thrive
- Inspiring more people and communities to take action for wildlife
- Leading on 'natural solutions'; championing the value of what wildlife can do for us
- Growing our resources, influence and reach to shape a strong, resilient organisation

Gloucestershire Wildlife Trust manages over 2,500 acres of land, from wetlands in the Severn Vale and heathland in the Forest of Dean, to limestone grasslands in the Cotswolds and a large ancient woodland at Lower Woods in South Gloucestershire. In addition to our community programmes, we have a vibrant programme of work outside our reserves, supporting farmers and landowners to deliver bigger, better and more connected landscapes where wildlife can thrive.

Gloucestershire Wildlife Trust expects its staff, paid and unpaid, to carry out their duties in a way which consistently exceeds the regulations and expectations of society at large in matters ethical and environmental. The Trust will ensure that its staff receives appropriate training and development opportunities based on a documented personal annual appraisal.





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# Gloucestershire Wildlife Trust's values

Our values reflect each of us being:

**A CARING COLLEAGUE** – supportive and honest

Behaviours: We are considerate, honest and fair. We make time for each other and actively listen to others concerns or barriers before responding and finding solutions together.

**ROOTED IN OUR COMMUNITIES** – making nature inclusive

Behaviours: We respect each other's views and recognise and value our different backgrounds and lived experiences.

**CHAMPIONS FOR WILDLIFE** – passionate and pioneering for nature's recovery

Behaviours: We have an urgency for action. We are open to new ideas, encouraged to take risks together, finding creative solutions and learning from our mistakes.



# Outline of main responsibilities

- Strategic leadership
- Lead on the development and delivery of GWT's finance strategy and policies, ensuring that we are taking a long-term approach to how we deliver our ambitions for nature and people
- Ensure that GWT is well-placed to capitalise on green finance opportunities, working across the SMT to optimise blended income models to deliver projects, programmes and core funding for our work
- Provide strategic financial guidance and challenge across the organisation, ensuring that our resources are well managed and that we are maximising our income opportunities
- Lead, manage, develop and support the Finance and Resource Planning team.

## 2. Financial planning, reporting and management

- Ensure that our financial and resource management systems meet all statutory and regulatory requirements.
- Lead the preparation and monitoring of the annual budget for the charity and its trading subsidiaries, supporting the SMT through the process, and gaining Board approval.
- Oversee the development and approval of the three-year operational business plan, identifying solutions for resourcing gaps and sustainability issues within teams
- Support Trustees, the Chief Executive and SMT with measurement of financial and resource performance, forward budgeting and cashflow modelling, including longer range, multi-year forecasts.
- Monitor income and expenditure monthly against forecast targets and brief the Chief Executive, SMT and Board of Trustees, drawing attention to areas where there are concerns or may be a need for corrective action.
- Via the Finance Business Partner, ensure that budget holders receive regular and reliable management information, and support their financial training and development



# Outline of main responsibilities

## 3. Compliance and systems

- Oversee external audit engagements and delivery in compliance with Charities Commission, HMRC, funders and Companies House requirements.
- Manage banking system for supporter subscriptions and donations (standing orders and direct debits).
- Maintain accurate records for Landfill Tax projects and meet all ENTRUST regulatory reporting obligations.
- Oversee processing of monthly salaries, pensions, and PAYE/NI, and annual returns as required.
- Maintain relationship with GWT's insurance suppliers, banks, legal representatives, pension provider and the manager of Trust Investments.
- Oversee the preparation of VAT and other statutory returns.

## 4. Projects

- Oversee the work of the Portfolio Management Officer (PMO) role, ensuring that the Project Management Framework is working smoothly and is working effectively throughout GWT
- Lead on the financial aspects of the GWT portfolio of work, providing support and challenge to business cases and ensuring that there are robust funding plans in place for the portfolio
- Via the Finance Business Partner, ensure that project managers are managing grant claims on time, comply with funder requirements, and maximise core funding.

## 5. Governance

- Provide support to the Chair of the Finance and Remuneration Committee, attending meetings of the GWT Board and other committees as necessary.
- Oversee and act as a Director on the Board of Gloucestershire Wildlife Enterprises.

## 6. Fundraising

- Oversee the work of the Funding Development Manager, ensuring that we are maximising income from grants and trusts and delivering requirements for compliance and post-award reporting.
- Support the PMO Manager role in working with sponsors and project managers to ensure that our stacked funding models are robust and taking account of the full mix of funding streams.
- Liaise with the Head of Supporter Development and other members of SMT to ensure our income models are aligned and optimised for delivery.
- Oversee the Finance Business Partner in monitoring the performance of our fundraising revenue streams .





## Personal Attributes

- **Problem-solver:** Demonstrates a proactive approach to identifying and resolving challenges and achieving targets.
- **Leadership:** A confident and inspiring leader who can motivate and guide cross-functional teams to achieve organisational goals.
- **Collaborative:** A team player who fosters strong relationships across departments, within teams and with external stakeholders.
- **Disciplined:** Self-disciplined, self-motivated and self-confident.
- **Strategic thinker:** Able to think critically and plan, develop and deliver long-term strategies that align with the organisation's vision and objectives.
- **Growth mindset:** able to learn new skills and a willingness to take responsibility for personal development in order to meet organisational needs.

## Skills and Competencies

- **Analytical skills:** Able to extract and analyse data, identify trends, and make data-driven decisions to improve performance and efficiency.
- **Communication:** Exceptional verbal and written communication skills, with the ability to present and convey complex financial information clearly and persuasively.
- **Regulatory knowledge:** In-depth understanding of compliance requirements related to charity finance, fundraising and filing of statutory and regulatory returns.
- **Financial acumen:** Skilled in budgeting from complex sources, VAT, forecasting, risk management and resource allocation, to ensure cost-effective operations.







# Person Specification

- Resource planning: Able to work with stakeholders in creating effective business plans, identifying the resource requirements for running a resilient organisation portfolio.
- Contractor management: Experienced in negotiating and managing contracts with external service providers including auditors, legal, banking, pension and insurance.
- People management: Leading, managing and developing a diverse team comprising professional, technical and administrative staff
- Fundraising: Oversight of successful grant and trust fundraising, with demonstrable impact in achieving growth (Desirable)
- Blended finance: Understanding of green finance, stacked funding models, with experience of leveraging income from different sources to deliver strategic objectives (Desirable)
- Portfolio Management: Strong understanding of project, programme and portfolio management functions





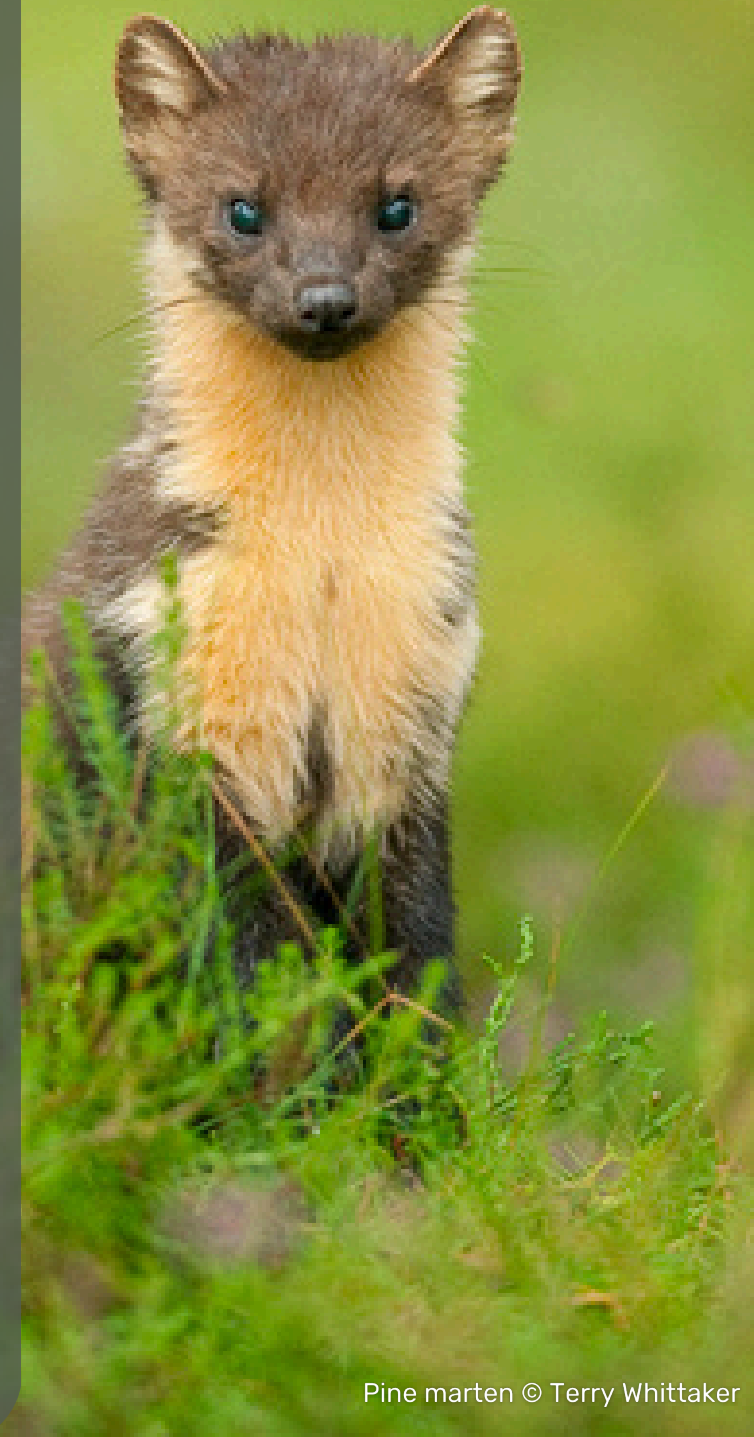


# Person Specification

## 3. Qualifications and Experience

### •Education:

- Qualified Accountant (CCAB qualified or CIMA)
- Bachelor's degree in a related field; or demonstrable relevant experience
- Project or Programme Management (desirable)
- Experience:
- People management with direct reports
- Minimum of five years' experience in a senior financial role
- VAT and reporting in a charitable setting (desirable)
- Oversight of grant and trust fundraising (Desirable)
- Working with a project management framework (essential) and oversight of a portfolio or project management function (Desirable)
- Proficiency in financial software and tools (essential) including XLedger (desirable)
- Multi-year resource planning in a small-medium sized organisation (£4m+)





# Terms of Employment

This is a Permanent Full-Time role for 35 hours per week and is subject to a six-month probationary period. Due to the nature of the Trust's work, occasional evening or weekend work may be necessary for which time off in lieu is given.

We offer a rounded benefits package to include life insurance of three times salary, a contributory pension scheme with generous employer contributions and an employee assistance programme. The postholder is entitled to 25 days paid leave per year pro rata (rising to 30 days through service) in addition to public holidays and Christmas closing period as well as two volunteering days. Other discounts and benefits are available too.

Our office facilities are at Robinswood Hill Country Park in Gloucester. This role will require regular travel to GWT offices and sites around the county on occasion.

It is the nature of the work of Gloucestershire Wildlife Trust that tasks and responsibilities are, in many circumstances unpredictable and varied. All staff are, therefore, expected to work in a flexible way when the occasion arises where tasks that are not specifically covered in the Job Description are undertaken, including providing cover for absent staff in order to maintain organisational effectiveness.

As part of its commitment to investing in its people, GWT trains and supports its staff in the delivery of their duties. Advice will be given in drawing up a personal development plan and all suggestions considered according to resources available and the over-riding priorities of the Trust. An appraisal process is carried out every year.

The post holder will be consulted by the Chief Executive prior to any proposed major changes to duties and responsibilities and reasonable notice will be given before implementation.





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# Equality, Diversity and Inclusion

Gloucestershire Wildlife Trust is committed to encouraging equality, diversity and inclusion among its workforce, and eliminating unlawful discrimination, harassment and victimisation. The Trust's policy is to provide equality, fairness and respect for all staff, whether temporary, part-time or full-time; ensure no unlawful discrimination against the Equality Act 2010 protected characteristics of age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race (including colour, nationality, and ethnic or national origin), religion or belief, sex and sexual orientation; and to oppose and avoid all forms of unlawful discrimination. A full copy of the policy is available on request.







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# How to apply

If you feel you have the necessary skills and experience to be successful in this role click on "Apply" here.

Closing date 28 March 2025

Week commencing 7 April 2025 there will be an initial 30 minute interview conversation with CEO

Formal interview week commencing 14 April 2025

Thank you for your interest in this position and we look forward to receiving your application.

