



## **Job Description**

**Post/Job Title:** Finance and Operations Director

**Location:** Psychosynthesis Trust, 92-94 Tooley Street

**Department:** Finance and Operations

**Salary:** Competitive plus pension + staff benefits

**Contract:** 3 days a week, permanent

**Holiday:** 25 days per year (pro-rata of 15 days) + 3 days Christmas closure

**Accountable to:** Executive Director

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## **Organisational Overview**

The Psychosynthesis Trust is a small educational charity that has a rich 50 year history of enabling human potential in the UK. Our founders were pioneering leaders in education, psychology, science and spirituality and we continue to work at that nexus today. Our work is based on psychosynthesis - a transpersonal psychological model and approach that integrates the spiritual aspect of the human experience.

Our core work is in providing personal and professional training programmes 'to help people to know and transform themselves'. We also offer counselling services and room rentals at our building at 92-94 Tooley Street.

Our values and our culture consider the whole, both in terms of individuals and society, as well as from an organisational perspective. We orientate to working with the qualities of love and will, bringing the principles of curiosity, inquiry and responsibility to our work and to each other.

The Trust has an intention of playing an important role in one of the most exciting times in history – helping people to finding meaning, purpose, wellbeing and a sense of place in an increasingly complex world. We believe that our work will help to enable an expanded sense of human consciousness in individuals and in society.

The breadth and depth of The Psychosynthesis Trust's training, counselling services and room-rental offering has developed significantly over the past 6 years. With this increased growth and with the intention of wanting to help more people 'know and transform themselves', we are entering a new phase of the Trust's life cycle. As such, we are looking for a new Finance and Operations Director who can help us develop and implement solid foundations and infrastructure from which to expand our work.

## **The Context of the Role**

As a member of the Leadership Team, the Finance and Operations Director leads the strategic development and implementation for the Trust's finance and operational team and functionalities. This role creates the enabling conditions to deliver our work. With the Leadership Team and the Board, the Finance and Operations Director also plays an important role in developing the strategy and culture for the whole organisation.

A key focus for the Trust and for Finance and Operations Director in the coming years will be on developing quality processes, systems and infrastructure which will help us become more efficient, effective and innovative. We want the Trust to be well run and to have a solid financial foundation. This includes developing areas such as people and team development, customer service, property and facilities development, data and knowledge management and financial analysis and reporting.

The right candidate will be a strategic systems thinker – someone who has a sense of vision and can see complex interconnected relationships and how they strategically fit together at a personal, interpersonal and systemic level. You will have an appetite for wanting to understand how to grow and scale an organisation in a way that is purpose led and entrepreneurially driven – with a mind-set that embraces human centred design and commercial sustainability. We are looking for a candidate that is comfortable with the complexity and challenges that come along with leading organisational change.

We are looking for someone who is ready to deliver as we have several large projects in motion that we want to implement in the next 6-18 months. This will include finding ways to improve the day to day running of our facilities.

The ideal candidate will be a leader who enjoys helping people realise their potential as individuals, as a team and as a community. And this includes role modelling and embodying the values of the Trust and the principles and practices of psychosynthesis. We are very excited to work with people who are equally enthusiastic about our vision, our purpose and the work of the Trust.

We value diversity and the intersectionality of people and their backgrounds. This is important to us as we seek to cultivate a creative and more expansive and inclusive attitude to difference in ourselves, our communities and our society. So, we are particularly keen to receive applications from Black, Asian and minority ethnic, people with disabilities, people who identify with being LGBTQIA, people who have a mental health condition or people who identify with being marginalised (or have been in the past).

This is an exciting role for someone who wants to be part of a growing organisation on the pioneering edge of psychological and spiritual development. We are a small team so there is great opportunity for personal and professional development and to feel like you are making a difference!

## **The Purpose of the Role**

The purpose of the role of the Finance and Operations Director is to lead, develop and to ensure implementation the overall strategy for The Trust's finance and operations functionalities.

## **Key Accountabilities**

- Contribute to the strategic leadership of the Trust as a member of the Leadership Team to enable the Trust to do its work with excellence
- Develop and implement the vision and strategy for the finance and operations of the Trust
- Lead and manage the Finance and Operations Team – ensuring that the team perform to a high professional standard whilst providing flexible administrative and logistical support for the delivery teams and our community

## **Key Functional Responsibilities**

- **Financial**, including
  - Develop overarching Finance Strategy and long term business model planning
  - Develop our strategic financial plan, including management of the annual budget processes – this to be done in conjunction with the Finance Manager, the Leadership Team and Board
  - Oversight of in-year financial reporting, through collation and analysis of key financial information on a monthly/bi-monthly basis for the leadership team and Trustees
  - Strategic overview of payments, payroll, financial controls, debt collection and quality of process and service in these areas
  - Manage all strategic financial and operational relationships
- **Governance and Risk**, including
  - Working with the Finance Manager to ensure timely submission of annual accounts and audit and requirements for Charity Commission and Companies House
  - Ultimate responsibility for compliance with Data Protection guidelines
  - Responsibility for legal requirements e.g. contract templates
  - Oversight of risk management reporting to Trustees
- **Building**, including
  - In conjunction with the Building Manager, establish a long term vision for managing 92-94 Tooley Street (our building)
  - Ensure that The Trust is a good Landlord and that there is a positive relationship with our tenants; responsibility for Lease and Service Charge, Shared Resource agreements
  - Have strategic oversight of major renovation works such as the upcoming ground floor renovation which takes place over the next 6 -18 months
  - Support Building Manager in projects as required and ensure that we meet all the Health and Safety Requirements

- **IT Systems**, including
  - Working with the IT Systems Manager, developing an overall IT architecture/infrastructure, enabling effective engagement for delivery of The Trust’s work; staying in tune with latest technological developments
  - Ensure delivery of IT system upgrade and data migration project
  
- **Customer Service**, including
  - Working with Operations and Programmes Team continually find ways to improve processes and infrastructure for our training delivery teams to do their work
  - Support the sense of community and find ways for the Operations team to host, serve and build our community and to meet their needs
  
- **People Development**, including
  - Providing leadership and management for the Building Manager, Finance Manager, Community Host, IT Systems Manager and Maintenance Staff
  - Ensuring all staff have personal development plans and peer learning processes in place to maximize their potential
  
- **HR Practice and Policy**, including
  - Ensuring that The Trust’s HR policies and procedures support personal growth, action learning and accountability
  - Managing the back office HR policies and processes such as contracting
  - Document and develop HR policies and tools

**Behaviours, Competencies and Experience**

<b>Behaviours and Relationships</b>	<b>Competencies and Experience</b>
<ul style="list-style-type: none"> <li>• Personal Awareness - has a strong sense of self and awareness of how one relates to others; is aware of personal impact; has a high level of personal resilience; open to change</li> <li>• Self- Autonomy –is aware of one’s needs and is able to adapt behaviours and actions accordingly, interested in personal development</li> <li>• Big Picture – is visionary, able to see the big picture and the ‘whole’ and is able to embrace complexity whilst holding the long term intention of the organisation</li> <li>• Critical Thinking – is able to challenge assumptions, analyse priorities, seek solutions, pays attention to detail, is able to</li> </ul>	<p><b>Essential:</b></p> <ul style="list-style-type: none"> <li>• Experience of leading strategy and business planning of finance and operations function</li> <li>• Preparing and presenting financial reports and analysis at Board level</li> <li>• Experience of leading and motivating a team and/or function within an organization</li> <li>• Experience in ensuring good governance and risk management</li> <li>• Has an appetite for delivering fantastic customer service and human centred</li> </ul>

<p>see risks and opportunities;</p> <ul style="list-style-type: none"> <li>• Relationships – is a good listener and communicator and is able to connect deeply with people in order to enable and inspire potential</li> <li>• Will – is intentional, proactive, responsible and purposeful; is able to make decisions</li> <li>• Innovation – is open to new ideas and to trying things out, is a good problem solver; takes an action learning approach</li> <li>• Adaptability – embraces complexity, is flexible and is able to work with ambiguity, willing to pitch in to support the ‘whole’</li> <li>• Love – is appreciative, inclusive and embraces difference</li> </ul>	<p>process design</p> <ul style="list-style-type: none"> <li>• Understanding of Charity Sector and Charity Commission Requirements</li> <li>• Very strong project management skills</li> <li>• Demonstrably good level of understanding of IT systems</li> </ul> <p><b>Desirable:</b></p> <ul style="list-style-type: none"> <li>• CIMA or other recognised qualification with substantial post qualifying experience</li> <li>• Experience in managing and developing property and facilities</li> <li>• Background or some exposure of working in education, service or charitable sector</li> <li>• Experience working in a small organization, with a rich heritage</li> </ul>
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## Values and Behaviours

Our values and behaviours are important to us – and as such we are looking for people who align and resonate with our values. This includes:

**Wholeness:** It is important for us to take time to see the bigger picture and the unity in multiplicity. We are interested in using different ways of knowing – the head, the heart and the body. We are motivated by serving the whole.

**Love:** We are looking for people who appreciate the strengths and potential in themselves and in others and supporting others in reaching their fullest potential.

**Inquiry:** We value an environment where we are learning as we go through our actions and taking time to reflect on what works, what doesn’t and what we need to do to evolve and adapt.

**Will:** We want to be intentional in our actions which are underpinned by strength, goodness and skill

**Responsibility:** It is important that we all take ownership to ‘know, master and transform ourselves’ and our relationships so that we can be of service to ourselves and others

**How to apply:**

Please explain in a maximum of 2 pages why you'd like to work for The Trust, what vision you have for The Trust's future and what contribution you'd like to make through this role. We are also interested in hearing about your life story and how this aligns to your purpose, strengths and interests. Please send this, along with your CV to Jen Morgan, Executive Director at:

**[jmorgan@ptrust.org.uk](mailto:jmorgan@ptrust.org.uk)**

**Closing Date is February 6<sup>th</sup> at 5pm**

**Interviews will be held w/c February 11<sup>th</sup>**