



Chief Financial and Commercial Officer

Recruitment Pack November 2024

Chief Financial and Commercial Officer

The Chief Financial and Commercial Officer will join our dynamic Executive Leadership Team, promoting close collaboration across the organisation and executive, to build synergy and shared success.

This role requires a blend of visionary financial leadership and strategic commercial oversight, working together with our executives to drive financial sustainability, commerciality and aligning financial performance with our social mission.

Location:

Bristol, with flexibility to work across Brandon sites, from home, and other locations as required.

Package:

c.£95,000



Brandon Trust

Brandon Trust is a pioneering charity supporting people with learning disabilities and autism. Our mission is to enable individuals to live fulfilling, independent lives.

Our mission is simple: to support individuals with learning disabilities and autism to live life to the fullest. For 30 years, Brandon Trust has been at the forefront of providing person-centred care and support. We believe in **empowering our people** and our communities, and this ethos shapes every decision we make. As a values-driven organisation, we take pride in promoting inclusivity, creating a supportive work environment, and making a tangible difference in people's lives.

For more information, visit our website:

www.brandontrust.org

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Our Vision

A place where people of different abilities truly belong

Our Purpose

We work along people of different abilities, so they are able to create opportunity and feel empowered to live the life they want

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Our Values



Our Behaviours

Listen hard

I actively listen to understand.
I ask questions rather than make assumptions

Make time

I make time to involve, inform and prepare people.
I provide feedback on decisions & outcomes that affect them

Provide access

I get to know people to understand what they need, to access place, people and information.
I work to make sure that people are not excluded

Take positive risk

I take a positive approach to risk and to trying new things.
I am bold, courageous and can ask questions.

Build confidence

I assume capacity and ability.
I seek opportunities to act in favour of, and in the best interests of others.

Be responsive

I am person-centred.
I think about the person, not just the task.

Be collaborative

I want to work with and learn from others to share ideas, knowledge and good practice

Be prepared

I equip myself with the skills, knowledge, training, tools, equipment & experience that I need.
I am diligent

Be adaptable

I am curious and find creative ways around challenges and barriers.
I adapt to make things happen

Advocate for others

I encourage people to believe in themselves and fulfil their dreams.
I recognise achievement

Make things clear

I communicate with care, in a way that is easy to understand, best suited to the individual

Provide choice

I make decisions with people, not for them.
I have confidence in other's ability to contribute & shape the future

Be consistent

I am dependable and I know the standard of work expected of me

Be accountable

I keep the agreements that I make.
I acknowledge that freedom & choice comes with responsibilities for my actions

Foster community

I promote connection & social integration, e.g. friendships, social interaction & employment



Our Executive Team



Helen England

Chief Executive

Helen has worked in health and social care for more than thirty years. Her professional roles have spanned the NHS, the private and the voluntary sectors. She started her career as a music therapist and has a particular passion for working in the field of learning disability, autism and mental health.

She is an experienced strategic director and CEO and has worked at board level for over 15 years, including serving as a trustee, non-executive director, Vice-chair and Chair.

Tanya Abbott

Chief Operating and Compliance Officer

Tanya joined Brandon as a support worker when the charity was founded in 1994 and her subsequent progress through the organisation allows her to bring a hugely valuable depth of understanding and experience to her current role. She has held senior roles in both quality and operational delivery, including Director of Operations. Her work to enable all staff to be leaders in quality has played a critical role in the achievement of our current, above average CQC ratings.

Tanya is a passionate champion of the people we support, ensuring that their voices, needs and wishes are at the heart of all we do.



Our Executive Team



Tracy Date

Chief Business Development, Enterprise and Partnership Officer

Tracy joined Brandon in 1995 as part of an NHS transferred workforce. Since then, she has worked in roles in residential care, supported living, day services and enterprises. Her wide-ranging experience has been hugely valuable in developing the depth of understanding and expertise needed in her current role.

Through her work in senior operations and business roles, she has led the innovation of new services models and growth of new business that have played a vital role in Brandon's development.

Tracy's commitment to a person-centred approach is at the heart of her drive to ensure that we always work alongside people we support and families to co-design support solutions that are right for individuals.

Kate Doodson

Chief Transformation, Performance and Digital Officer

Kate is an experienced Digital Transformation professional and has come to Brandon with a wide range of public, private and charity sector digital experiences. Kate has worked in the field of digital and IT for over 25 years and is passionate about developing universally accessible services that truly make a difference to people's lives; through supporting independence, improving ease of access and freeing data for decision making.

Kate has a broad strategic experience; she has sat on a wide range of boards including Vice Chair of a Further Education College and Committee Chair at a south-west University. She supports the digital economy through groups such as Digital Somerset and SW Infrastructure Partnership.



Our Executive Team



Donna Colley

Chief People Officer

Donna is an experienced People professional, with a blend of private, public, and self-employed consultancy experience, having worked in HR for over 20 years. Passionate about building people-centric approaches and bringing a modern, fresh and collaborate approach, Donna is committed to creating a 'great place to work', bringing the human element to everything we do and ultimately, ensuring our services deliver care and support to the people we support.

People, change and transformation is key to Donna's work, bringing people with her along the way and aligning exciting projects to enhance Brandon's offer, which includes equality, diversity and inclusion, wellbeing, and organisational development.

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Purpose

The Chief Financial and Commercial Officer will provide inspirational commercial leadership and expert financial oversight, driving financial resilience, strategic asset management, and sustainable growth. This role calls for a highly collaborative, innovative approach to designing a commercial strategy that optimises our financial performance and supports both operational efficiency and our social mission.

A key member of the Executive Leadership Team, the Chief Financial and Commercial Officer will be instrumental in building a culture that prepares us to meet current and future organisational and sector needs. This will require role-modelling collaborative leadership and ensuring that Brandon's financial and commercial capability enables us to achieve long-term success. In addition, the postholder will be integral in maximising value from property and assets, ensuring that Brandon's portfolio supports our operational and strategic objectives.

This role requires a values-driven financial expert who can balance commercial decision-making with our core goal of empowering individuals and creating a thriving, inclusive workforce.

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Key Deliverables

Strategic Financial and Commercial Leadership

- Provide strategic, forward-thinking financial leadership, ensuring that Brandon's medium term financial plan aligns with our strategic objectives and charitable purpose.
- Oversee financial planning, forecasting, and analysis, delivering insightful, data-driven recommendations that support the Executive Leadership Team in decision-making.
- Develop and oversee key financial performance indicators to ensure financial sustainability across all parts of the organisation and the effective use of resources.
- Ensure the timely and accurate preparation of financial reports for the Executive Leadership Team and Board of Trustees, maintaining transparency and accountability.
- Drive the development of collaborative commercial strategies, working closely with the Chief Business Development, Enterprise & Partnerships Officer to establish target margins and identify new revenue streams and growth opportunities. This will support Brandon Trust's mission of empowering people with learning disabilities and autism.
- Provide strategic financial advice to operational and business development executives and teams, ensuring that pricing strategies and growth initiatives align with our mission while adopting a strong commercial growth mindset.
- Partner with external stakeholders to build and strengthen financial relationships, exploring mergers, acquisitions, and strategic alliances that support Brandon's long-term objectives and drive sustainable growth.

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Key Deliverables

Property and Asset Management

- Develop and implement a strategic asset management plan that maximises the value of Brandon's property portfolio and investments and supports our operational and service delivery needs.
- Oversee the management of assets, ensuring they remain compliant with legal and regulatory requirements and contribute positively to the well-being of the people we support.
- Lead the identification and execution of capital investment opportunities, expanding or enhancing services where appropriate
- Ensure Brandon's procurement capability is fit for purpose and allows all resources to secure best value.

Risk Management and Compliance

- Ensure that robust financial controls are in place to mitigate risk and safeguard the charity's assets, aligning with regulatory and statutory requirements.
- Ensure that Brandon complies with all relevant charity-specific financial regulations and governance standards, securing its position as a trusted, sustainable charity.
- Lead on the business cycle for the Finance, Audit and Risk Committee, ensuring that reporting and assurance to the Committee represents best governance practice

Key Responsibilities

Executive Leadership

- Collaborate with the Executive Leadership Team, shaping and delivering Brandon's overall strategy with financial sustainability at its heart.
- Act as a role model for Brandon's values, fostering a leadership culture that integrates ethical decision-making across all levels.
- Provide strategic support to the CEO and Wider Leadership Team, focusing on long-term success and delivering positive outcomes for the people we support.

Leadership and Development

- Lead a high-performing Finance team, creating an environment that promotes growth and development.
- Encourage a culture of continuous improvement, ensuring that team members are empowered to contribute to the charity's mission while building their professional skills.
- Provide coaching and mentoring to promote team resilience and strong financial acumen and confidence in leaders across the organisation.

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Key Responsibilities

Reporting

- Oversee the preparation of financial statements and audit processes, ensuring all reporting is accurate, transparent, and timely.
- Present financial analysis and reports to the Board of Trustees, ensuring confidence in Brandon's financial management and future direction.
- Ensure compliance with external regulations, maintaining strong governance across financial and property management activities.

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Key Relationships

- Contribute to values led leadership and line management within Brandon, adopting a future and solution focused mindset and working collaboratively with colleagues within and across teams.
- Establishing a good working relationship with the CEO, providing any necessary ad-hoc support and representing Brandon externally when required.
- Develop excellent working relationships, and collaborate with, the Executive Leadership team.
- Collaborate with the Chief Business Development, Enterprise & Partnerships Officer for commercial and growth strategies.
- Provide necessary assurance to the Board of Trustees and contribute to good working relationships between the Executive Leadership Team and the Board.
- Deliver effective line management within the Finance Team.

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Person Specification



Education and Training

- Level 7 (advanced) academic qualification is desirable.
- Advanced professional qualification, and membership (e.g., ACA, ACCA, CIMA) and career track record that demonstrates comprehensive competency in financial and executive leadership.
- Evidence of continuing professional development in finance, strategic leadership, and other relevant disciplines (e.g., property and asset management, risk management, charity finance).
- Demonstrated business acumen and strong commercial approach to financial management, with the ability to align financial and commercial strategy with broader organisational goals.
- Evidence of professional development in personal leadership effectiveness and other professional competencies relevant to the role

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Person Specification

Achievements and Experience

- Proven track record of successful strategic financial leadership at the executive level, ideally within a complex, values-driven organisation such as a charity or public sector body.
- Demonstrated experience in presenting financial reports and strategy to Boards, contributing to high-level debate and decision-making processes.
- Experience of successfully leading commercial strategy, identifying new revenue streams and financial partnerships that align with the organisation's mission.
- A track record of leading property and asset management strategies that maximise organisational value.
- Significant experience in translating strategic financial goals into deliverable plans, tracking and measuring success through performance metrics.
- Experience in navigating and managing risk and compliance within a regulated environment, with a focus on financial controls and safeguarding assets.
- Experience in managing change, particularly with regard to financial systems, restructuring, or strategic asset management.
- Strong background in financial planning, forecasting, and managing large, complex budgets.
- Experience in mergers, acquisitions, or organisational restructuring (desirable)

Person Specification

Skills and Abilities

- Demonstrable ability to provide strategic financial leadership at a senior level, influencing both financial and non-financial decision-making.
- Excellent commercial insight, with the ability to identify and capitalise on opportunities that drive organisational growth and financial resilience.
- Proven ability to lead teams effectively, promoting a culture of collaboration, innovation, and continuous improvement.
- Strong analytical and problem-solving skills, with the ability to present complex financial data clearly and concisely to a range of audiences.
- Skilled in property and asset management, with a focus on ensuring alignment between asset strategy and operational needs.
- Advanced financial planning and risk management abilities, with a proactive approach to improving financial performance

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Person Specification

Skills and Abilities

- Demonstrated competency in budget management, resource allocation, and financial forecasting, ensuring sustainable growth.
- Mature and confident use of financial systems and digital tools to drive efficiency and enhance performance.
- Able to adapt to and optimise hybrid working solutions, understanding the needs of a cross-generational workforce.
- Able to optimise solutions and approaches to hybrid working and balancing the needs and expectations of our organisation and a rapidly changing cross-generational workforce (desirable)

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Person Specification

Personal Attributes

- **Positive and optimistic:** Approaches challenges with positivity and optimism, attuned to the needs and emotions of others. Has a proven ability to create inclusive, open, and interactive cultures across teams and the wider organisation, where everyone feels valued and heard.
- **Pragmatic and grounded:** A down-to-earth, pragmatic leader capable of making clear-headed decisions without competing with others. Prioritises collaboration and collective success over individual competition, focusing on what benefits the organisation and the people it serves.
- **Altruistic and fair:** Demonstrates a deep concern for social justice and fairness, both within the workplace and in the broader community. Has a track record of working collaboratively to enhance staff morale, foster organisational citizenship, and promote prosocial behaviour.
- **Team builder and commercial leader:** Passionate about building cohesive, high-performing teams while driving commercial change at Brandon Trust. Inspires and unites teams to navigate the organisation's growth journey with ambition and purpose.
- **Organised and results-oriented:** Highly organised with a strong focus on delivering results. Demonstrates the ability to manage complex tasks and deadlines efficiently while ensuring strategic objectives are consistently met.

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Person Specification

Personal Attributes

- Logical innovator: Brings thoughtful, structured innovation to the role, balancing strategic thinking with practical, data-driven solutions. Demonstrates the ability to innovate in ways that ensure sustainable growth for Brandon Trust.
- Strong alignment with Brandon Trust's values: Models ethical leadership and is committed to the charity's mission of empowering people with learning disabilities and autism.
- Collaborative and inclusive leadership: Fosters a supportive, collaborative, and inclusive working environment where all team members feel empowered to contribute, develop, and grow.
- Proactive and solutions-focused: Brings a solutions-oriented mindset, adept at navigating complex challenges while maintaining a focus on strategic and long-term organisational goals.
- Excellent communication and interpersonal skills: Strong communicator, able to engage and influence stakeholders at all levels, both internally and externally, with clarity and empathy.

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The recruitment process

At Brandon Trust, we are committed to ensuring a transparent and fair recruitment process, designed not only to assess the skills and experience of our candidates but also to ensure alignment with our values. We believe it's important to get to know the person behind the CV, which is why our process is designed to offer a holistic view of each candidate's capabilities.

We aim to provide a process that is inclusive, fair, and robust, allowing us to find the right leader who not only brings the necessary expertise but also shares our passion for empowering people with learning disabilities and autism.

If you require any additional support or changes made to help you do your best at any point of the process, please contact Natalie Blake (natalie.blake@brandontrust.org)

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The recruitment process

Our recruitment process will involve the following stages:

- **CV Sifting:** Our team will carefully review all applications to identify candidates whose skills and experience best match the role requirements. Those who best meet the requirements will be invited to a short call to discuss the role and their experience in more detail.
- **Stakeholder Panel:** Shortlisted candidates will meet with a panel of key stakeholders, including individuals we support. This will provide candidates with the opportunity to understand the real-world impact of the CFO role and gain feedback from those who are directly affected by the work we do at Brandon Trust. The stakeholder panel will also allow us to assess how well the candidates connect with our mission and values through meaningful interactions with those we support.
- **Online Psychometric Assessments:** To better understand your leadership style, cognitive abilities, and behavioral traits, we will invite you to complete a series of online psychometric assessments. These assessments help us gain insight into how your strengths align with the demands of the CFO role.
- **Assessment Centre:** Final stage candidates will be invited to an assessment centre on **13th December in Bristol**. The day will include a series of exercises designed to evaluate your strategic thinking, leadership capabilities, and ability to work collaboratively. This will also be an opportunity for you to engage with key members of our Executive Leadership Team and learn more about life at Brandon Trust.

Further information

If you're interested in this role and would like to apply, please go to:

[Chief Financial and Commercial Officer](#)

We will be closing applications on **29th November** at the latest. However, due to anticipated interest, we may close the process earlier, so we encourage you to apply as soon as possible.

If you have any questions about the application process, please contact:

Natalie Blake (natalie.blake@brandontrust.org)

Our CEO is very happy to offer informal conversations with interested candidates in advance of applications being submitted.

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