

TACKLING FINANCIAL EXCLUSION IN A PANDEMIC

SENIOR FINANCE OFFICER



TURN2US
FIGHTING UK POVERTY

A NOTE FROM TOM

At Turn2us, we believe no one in the UK should live in poverty. We have a deep, committed and impatient drive to support people to build financial security equitably across the UK.

We work alongside those who have experienced not having enough money to live on to help them cope with life-changing events. This can include job loss, losing a home, leaving a partner, illness or bereavement. We do this through providing cash grants directly and by giving people the tools they need to access benefits or other grant funds. We also challenge the systems that make our programmes necessary for a country that is the fifth wealthiest economy in the world.

The coronavirus pandemic has had a huge impact on the lives and incomes of millions of us in the UK. With many of us left struggling to keep our heads above water after losing our incomes, there has never been a more significant period of economic disruption in most of our lifetimes. The social injustices that create inequalities across society are more apparent than ever – pushing people further into poverty and exclusion.

The vital work of the charity is supported by a complex financial structure, with two subsidiary limited companies, including a care home business which operates nine homes throughout England and a small trading company.

The profit from the companies fund the charity, and in addition, our fundraising team generates income from donations, grants, legacies, and corporate partnerships.

The finance team is a shared service that manages and administers all the financial activity of the charity and both subsidiary companies, with a total annual turnover of about £30m. As such, the work is varied and requires a broad understanding of the financial requirements of both charities and businesses.

We are a directorate that works collaboratively with our colleagues to support their important work, to help them focus on the deep impact we want to have by working alongside people facing financial shocks and to support the highest quality care for the residents of our homes.

If you are interested in a challenging and varied finance role, we very much want to hear from you.

This pack provides information about our work, structure and our plans for the future. You will also find specific details on the skill requirements for this role and information on how to apply. We look forward to hearing from people who share our commitment and ambition for change for people living in financial hardship across the UK.

Tom Mathew
Director Finance
& Resources



POVERTY IN THE UK

There was already one in five people below the poverty line in the UK before the coronavirus pandemic hit. However, in light of the coronavirus, the number of people struggling to get by is likely to increase as unemployment continues to increase and the economic future of our country remains uncertain. We know that it is the most vulnerable among us who will be impacted the most, with women, single parents, people with disabilities, and Black, Asian and other minoritised communities most disproportionately affected.

In the first 100 days following the March lockdown in 2020, we saw an unprecedented rise in a demand for our services – over 500% in some cases. One of the reoccurring issues people told us about was that they were struggling to cover the basics, such as putting food on the table, or paying their rent and bills. In a country that believes in fairness and justice, we believe that isn't right that people are left struggling to keep their heads above water.

Every year, the Joseph Rowntree Foundation (JRF) works out how much money you need to manage day-to-day in the UK. The latest figures show that single person needs £19,200 a year before tax and benefits; a single parent with one child needs £28,450, and a family of two parents and two children need £37,400.

In the financial year ending 2019, median household disposable income in the UK was £29,400.

Around 14.4 million people live in poverty in the UK: 8.5 million adults, 4.5 million children and 1.3 million pensioners (Social Metrics Commission – SMC).

People with disabilities are much more likely to be living in poverty: half (50%) of households facing poverty consist of families containing one or more people with a disability (SMC).

Contrary to assumptions, unemployment is not necessarily a driver of poverty. Increasingly, it's people in work who face poverty.

Recent JRF research shows that 60% of people in poverty in Britain live in a household where someone is in work. However, renters are disproportionately affected by poverty: over 85% of people in poverty live in rented accommodation.

Around £20bn of benefits went unclaimed last year, reflecting the complexity of the system and barriers to claiming.

Each person not claiming just one benefit entitlement could be missing out on over £2,000. In 2017/18 Trussell Trust gave over one million emergency food packages, of which over 40% were given due to 'benefit delays' or 'benefit changes'.

At Turn2us, we are committed to working with others to change the poverty landscape in the UK. To do this, we co-produce our programme design, delivery and evaluation with people who have lived expertise of financial hardship. That, combined with our evaluation of our programmes and data insight will make the development of all of our work – from policy influencing, fundraising, communications and programming – fit for this purpose.

OUR WORK IN NUMBERS



1 IN 3

helpline users identify as having a disability, compared to between 15-20% nationally



2.8M

in grants were given to 2,986 people in financial need



39%

of our grants were made to women and children escaping domestic violence



2 OUT OF 3

Benefit Calculator users live in rented accommodation, compared to 20% nationally



1 IN 3

online users identify as having a disability



HALF

had seen a significant decline in their finances in the last twelve months



50%

of Benefit Calculator users are in work



77%

of Benefit Calculator users earn less than £10,000



ABOUT US

Turn2us is a national charity that provides practical information and support to people facing financial shocks. We work alongside those who have experienced not having enough money to live on to develop practical information and support that helps people cope with life-changing events such as job loss, illness or bereavement.

Our purpose: So everyone has the opportunity to build financial sustainability and thrive, Turn2us offers the information and support people need in the face of life changing events, and collaborates to tackle the causes and symptoms of poverty.

HOW WE CAN HELP

BENEFITS CALCULATOR

The [Turn2us website](#) includes a Benefits Calculator to find out what welfare benefits and tax credits you could be entitled to, a Grants Search to find out if you might be eligible for support from over **1,500 charitable funds**, and a range of information and resources to help people struggling to get by.

DIRECT FINANCIAL ASSISTANCE

We also provide direct financial assistance through a range of specific funds that are managed directly by the charity. This includes the Elizabeth Finn Fund, which supports people from over **120 different professions**, and the Turn2us Response Fund which supports people when they have had a life-changing event in the last 12 months that has left them in financial hardship.

NON-JUDGEMENTAL HELP

8.8m people visited our website last year to find non-judgemental help and information, which equates to 13 people every minute; **2.5m people** completed a Benefits Calculation to understand their benefit entitlement; and over 1m people carried out a Grant Search.

WORKING CLOSELY ALONGSIDE A RANGE OF ORGANISATIONS

We work closely alongside a range of organisations including Shelter, Trussel Trust, Macmillan and Gingerbread to get help to people when and where they need it most, and over **200** of our own volunteers committed more than **3,300** hours to helping people in their communities.

AWARDING GRANTS

Last year, our helpline handled **101,000** direct enquiries. We also awarded over **£2.8** million in grants to **2,986** people in financial need with **4,937** household members.

INFLUENCING GOVERNMENT & POLICY MAKERS

We also work with partners to lead and drive campaigns, research and influence government and policymakers to drive lasting change in UK poverty.

Examples of recent campaigns and reports can be seen on the [Turn2us website](#).

OUR ORGANISATION AND HISTORY

We've had a long and varied history over the years, but our mission has always been the same - to fight poverty in the UK and help people through tough times.

The Turn2us story began in May 1897, when our founder, Elizabeth Finn, set out to right wrongs of social injustices. Armed with nothing more than a desire to help and a handful of supportive friends, Elizabeth set out to make a difference to people who were struggling to heat their homes or provide for their children. 123 years later, her legacy lives on as Turn2us continues to tackle the causes and symptoms of UK poverty.

We are a national charity helping people when times get tough. We provide financial support to help people get back on track.

OUR STRATEGIC AIMS ARE

1

Deliver high-quality, practical programmes that include information and financial support so that people can build their own financial sustainability and thrive.

2

Deliver even better impact for people facing financial hardship through the co-production of our work with experts who have lived experience, in collaboration with other organisations and through a dedication to insight, evaluation, learning and improvement.

3

Build the profile of Turn2us and its work to reach people facing life-changing events and experiencing poverty, and secure support for the work.

4

Develop our influence on policy, practice and public opinion, tackling the prejudice towards people experiencing poverty and insisting on their fundamental rights to access social security.

5

Invest in our culture, systems, knowledge and skills.

6

Maximise our assets and secure income ethically to achieve impact.



THE NEED FOR OUR SERVICES

The surge in demand for Turn2us services has been unprecedented since the start of the public health measures in the UK to deal with the coronavirus pandemic.

THE DEMAND FOR OUR SERVICES

SINCE MARCH 2020



Over **4.4 million** people have started benefit calculations, with over 2.6 million completing them



More than **8.8 million** people have visited our website for support – a significant increase on last year



We have awarded more than **£4.1 million** in direct cash grants



Over **3.1 million** people have completed Grant Searches



More than **81,000** people have reached out to our helpline



OUR TIMELINE

1897

Elizabeth Finn founds the Distressed Gentlefolks' Aid Association at the age of 72.



1904

The charity receives its first legacy from founding Chairman, **Colonel William Knolly**, of £450, which is £40,000 today.



1948

Shortly after the Second World War, there's a shortage of care homes for older people. The charity buys a home in Surrey as well as two other care homes the next year.



1965

The charity opens its first care home in the North of England, Hampden House, which was also the first purpose built care home in Harrogate.

1999

Times are changing. Following talks with supporters, the charity changes its name from the Distressed Gentlefolks' Aid Association to the Elizabeth Finn Trust in honour of our founder.

2007

The number of people coming to us for help is increasing so we create a new service called Turn2us. **The service sets up a website** and helpline to help people in financial hardship to access welfare benefits, charitable grants and other financial help and trains volunteers, advisers and caseworkers to help those who need further support.

2008

Elizabeth Finn Care wins the 2008 Third Sector **Award for Innovation in Grant Making**.

2009

Turn2us is formally reintegrated with its parent charity, Elizabeth Finn Care. The Charity reaches a major landmark as it has given away a total of **£130,000,000** in direct grants since its foundation.

2010

Elizabeth Finn Care wins a competitive bid from the City of Edinburgh Council to consolidate **35 poverty-related funds** into The Edinburgh Trust, a charitable fund for the people of Edinburgh.

2011

The Turn2us service grows in size with over five million people in financial difficulty using the service - this includes **over 100,000 calls** to the helpline since its foundation.

2012

The Turn2us online service receives the accolade of a **Nominet Internet Award** for being one of the best online charity initiatives in the UK.homes the next year.

2012

The work of Elizabeth Finn Care continues to grow with over **350 volunteers** providing face-to-face support to those seeking our help.



2013

Turn2us launches a new **Benefits Calculator** to take into account the greatest ever overhaul of the benefits system.

2015

We integrate all of our activities under the name Turn2us. This is to help us make the biggest impact we can for people experiencing tough times. We continue to give direct grants to people and their families under the name Elizabeth Finn Fund and The Edinburgh Trust.

2017

Turn2us launches the Response Fund to help to help people who have had a life-changing event in the last 12 months that has left them struggling financially.

2020

The charity launches its new purpose and three year strategy. This coincides with the coronavirus outbreak and subsequent lockdown, which we respond to by raising over £2.4 million and awarding a record **£1.3 million in crisis grants** within just three months.

SENIOR FINANCE OFFICER

Job Title:	Senior Finance Officer
Department:	Finance
Reports to:	Head of Finance
Direct Line reports:	Purchase Ledger assistants (x2)
Location:	Head Office, Hammersmith, London

Purpose of the Role:

An experienced finance professional to provide hands-on day-to-day management of the financial accounting of the group. The finance team is a shared service supporting the charity and both subsidiary companies. The maintenance of a strong service to and relationship with the care home business is a critical success factor.

Key Responsibilities and Accountabilities:

- 1 Financial accounting operations, financial controls;**
- 2 Develop and maintain a culture of continuous improvement;**
- 3 Support the preparation of the annual report and financial statements**

Duties

1. Financial accounting operations, financial controls;

- Oversee the purchase ledger, ensuring that the team maintains an accurate, timely and controlled process to record and pay invoices, expenses, and other costs, (dealing with VAT entries correctly and ensuring correct coding) in addition to processing credit cards. Ensure that payment processes are up to best practice standards and fraud prevention is in place.
- Manage and co-ordinate the multiple BACS runs and international payment runs, ensuring sufficient authorised users available to carry out the future calendar dates of payments/ income runs
- For the trading subsidiary raise sales invoices for licence fees. Perform credit control duties on aged debt.
- Perform daily bank reconciliations for the Groups bank accounts and liaise with the bank when required.
- Reconcile balance sheet control accounts accurately every month and ensure that any issues identified are resolved effectively.
- To ensure that all journals postings and corrections are done in a timely manner.
- To manage the banking, ensuring that cheque income is recorded and coded accurately; and banked promptly; and that the group has sufficient cash readily available in each subsidiary to meet day to day working capital needs.
- To perform the interface between the payroll and general ledger, posting monthly payroll journals for the Group. Ensuring that monthly reconciliations of all payroll accounts are completed and maintained effectively.
- To load correctly through the Legal and General interface, all individuals' pension entitlements and to ensure that the pension control account is promptly reconciled and issues resolved.
- To prepare and submit the quarterly Group VAT return.
- To prepare and submit the quarterly Gift Aid return.
- To ensure that Office of National Statistics returns are compiled and filed promptly.
- To ensure any other statutory returns such as P11d are compiled and filed promptly.

2. Develop and maintain a culture of continuous improvement;

- To maintain a strong relationship with the care home administrators and managers, understanding his/her requirements and responding proactively to their financial accounting needs.
- To ensure that appropriate documentation exists around critical financial processes and ensure a culture of continuous improvement in all financial processes.
- Respond quickly to control recommendations from external audits and other reviews and ensure improvements have been fully assessed and appropriate improvements properly implemented.

3. Support the preparation of the annual report and financial statements;

- To assist in the preparation of the audit deliverables so as to provide the external auditors with relevant schedules and documentation supporting the annual accounts.
- To assist in the preparation of the annual report and financial statements including notes and liaising with auditors throughout the audit process to finalise numbers.

These are the normal duties, which the Charity requires from the position. However, it is necessary for all staff to be flexible and all employees will be required from time to time to perform other duties as may be required by the Charity for the efficient running of the charity. This Job Description is non-contractual. It will be reviewed from time to time and may be subject to change.

At Turn2us, we are committed to protecting personnel, children, adults, and service users from any harm arising from each other, themselves, our activities, or organisational failings whilst in contact with us. The post holder will be required to follow the safeguarding policy and will be responsible for integrating safeguarding into all aspects of their work.

The post holder will be expected to ensure that their work complies with contractual terms and conditions, the Charity's policies and procedures and key legislation, including the UK General Data Protection Regulation (GDPR) and charity law.

PERSON SPECIFICATION

Skills:

- Excellent interpersonal and verbal & written communication skills
- Excellent IT skills including Excel
- High attention to detail
- Ability to work alone and as part of a team
- Ability to communicate financial concepts to a non-financial audience
- Excellent time management and planning skills

Knowledge:

- Practical understanding of basic accounting principles
- Knowledge of best practice financial controls
- Knowledge of Charity Accounting & Law, regulatory reporting and compliance (desirable)
- Practical understanding of VAT

Experience:

- Experience of using a similar computerised accounting software
- Experience of balance sheet reconciliations
- Exposure to different types of taxation and processing associated returns

COMMITMENT TO DIVERSITY & INCLUSION

We welcome applications from anyone regardless of their age, experience, disability, ethnicity, sexuality, gender and socio-economic background. We particularly welcome applications from disabled candidates, and black, Asian, and minority ethnic candidates, as these groups are under-represented within our organisation.

Turn2us is deeply committed to inclusive working practices, so during the application process we commit to:

- Paying for childcare whilst you're at Turn2us interviews where these take place in person.
- Paying for your travel costs to the office and back for interviews.
- Making any reasonable adjustments
- Providing this document in a Word document format readily available to download.
- Offering a guaranteed first stage interview with Turn2us for disabled candidates who meet the minimum requirements for the role.

HOW TO APPLY

If you are interested in applying, please click on this [LINK](#) which will take you to our Applied platform, which supports Turn2us to recruit people free of bias. As part of the recruitment process, you will be asked to complete some questions around yourself which are linked to the requirements for being successful in this role.

You will also be asked to submit personal details including diversity data. All diversity data will be treated as confidential. Those involved in the selection process will NOT have access to it. The information given by candidates will be solely used for the purpose of improving the recruitment process.

Turn2us is an equal opportunities employer and welcomes applications from members of all communities. It is committed to equality of opportunity, inclusion and diversity. We encourage and welcome applications from all parts of the community regardless of age, disability, sex, gender reassignment, sexual orientation, pregnancy and maternity, race, religion or belief and marriage and civil partnerships.

Turn2us particularly welcomes applications from those who have had experience of poverty **themselves or of tackling poverty**

Turn2us wants to enable an environment where everyone is kept safe from harm and can thrive. We are committed to **safeguarding** everyone involved in our charity and the work we do. Please click on our [Safeguarding Policy and Code of Conduct](#)

Please let us know if you will require any special provision as a result of any disability should you be called for interview.