

Candidate Pack for CFO



Welcome

Dear Candidate,

Thank you for your interest in Affinity Trust and in this opportunity to join us as our Chief Financial Officer. It is a privilege to lead an organisation with such a strong legacy and such an exciting future. Affinity Trust has supported people for more than 30 years and today we work across England and Scotland, supporting more than 1,000 children and young people, adults and older people through a wide range of services.

We are a values-led organisation with a clear purpose: to support people to live the lives they choose, and we have ambitious plans for sustainable growth in the years ahead. I joined Affinity Trust recently as Chief Executive, following the retirement of my predecessor after 18 years of dedicated leadership. It's a real privilege to lead an organisation with such a strong legacy—and an exciting future.

We are entering a new chapter for Affinity Trust, with changes across our Executive Team and a clear focus on strengthening the capability, confidence and discipline needed to support growth, performance and long-term sustainability. This is a broad and influential executive role, and we are looking for an experienced senior leader who can bring strategic financial leadership, sound judgement and strong organisational insight from day one.

You may already be operating at CFO, deputy CFO or equivalent executive level in a large and complex organisation, or you may bring broader senior leadership experience from a smaller organisation, with the breadth, Board exposure and credibility to step quickly into this role.

Above all, I am looking for a leader who shares our values, brings pace, credibility and resilience, and is willing to be visible and connected across the organisation. This is not a role that can be done only from a distance; it requires someone who will build strong relationships, work closely with colleagues and understand first-hand how the organisation operates, while also providing clear challenge, assurance and support at Executive and Board level.

I hope this pack gives you a sense of our ambition, our culture and the importance of this role, and I look forward to hearing from candidates who are excited by the opportunity to help Affinity Trust grow with confidence, strengthen organisational performance and increase our impact.

If you share our ambition, our values, and our belief in what's possible—we'd be delighted to hear from you.



Kerry Dearden
CEO

About us

Be Part of Something Extraordinary:

Affinity Trust is a national charity supporting children and young people, adults and older people with learning disabilities, autism and other support needs to live good lives. We work across England and Scotland and support more than 1,000 people through a wide range of services, including supported living, residential care, community-based support and specialist services for children and young people. With operations spanning around 250 locations and partnerships with commissioners, housing providers and other stakeholders across multiple regions, we are a substantial, values-led organisation with real scale and complexity.

People are at the heart of everything we do. Our values shape how we work every day: we listen, we learn, we build on strengths, we work together, we take responsibility and we have the courage to try new things. We are also committed to co-production and to ensuring that the people we support help shape our services and our future. For an incoming CFO, this means joining an organisation where financial leadership, organisational performance and investment decisions must all remain closely connected to quality, lived experience and the outcomes that matter most.

Now, Affinity Trust is seeking an outstanding Chief Financial Officer to join our Executive Team, reporting to the Chief Executive. The role has responsibility for finance, payroll, procurement, performance and business intelligence, technology, and information governance, including acting as Senior Information Risk Owner (SIRO).

About the Role

We are looking for a strategic and hands-on CFO who can help ensure long-term sustainability, strengthen organisational performance and support better outcomes for the people we support. While financial leadership is fundamental, the role goes well beyond finance alone. You will play a central role in shaping financial strategy, advising and constructively challenging the Executive Team and Board, and ensuring that finance, insight, systems and technology work together effectively across the organisation to support confident decision-making, accountability and growth.

Affinity Trust is at an exciting point in its development. We have a clear strategic focus on quality, growth, financial sustainability and workforce development, and we are building the capacity and capability needed to support more people in the years ahead. For candidates, this is an opportunity to join an organisation with strong social purpose, clear ambition and a genuine commitment to improving lives through high-quality, person-centred support — and to play a central role in ensuring we have the financial strength, insight, systems and discipline needed to grow with confidence.

Most importantly, you will be instrumental in realising our guiding belief: that with the right support, anything is possible. This role is key to Achieving More Together — our commitment to growth, inclusion, and co-production with the people we support.

Why Join Us

This is an opportunity to make a significant contribution to the future of Affinity Trust at a time of ambition and growth. You will join an organisation with a clear purpose, strong values and a commitment to delivering high-quality support, and play a key role in helping us grow sustainably across children, young people and adults. If you are motivated by purposeful leadership and want to use your financial, strategic and organisational expertise to help shape a stronger, more sustainable future, we would be pleased to hear from you. This is a chance to help Affinity Trust grow with confidence, strengthen organisational capability and increase impact for children, young people and adults.

Our Purpose

Supporting people to live their life, their way.

Our Values

- People are at the heart of everything we do – We listen, we learn, we build on strengths.
- We work together – We are one team. We value people's strengths and differences.
- We give our best – We do what matters. Good days and bad, we take responsibility.
- We have courage – We try new things. We are creative, adaptable, and always moving forward. This isn't just another leadership role — it's a chance to be part of something truly meaningful, at a time of growth and momentum. If you're a compassionate, courageous leader ready to shape the future of social care, we'd love to hear from you.



Making Independence Possible

At Affinity Trust we create opportunities for people to lead their best lives. Everything we do is rooted in the belief that with the right support, people with learning disabilities and autism can live full, rich, and meaningful lives — lives where they are in control and wherever possible we empower them to make their own choices, pursue their goals, and participate fully in their communities.

As our new CFO, you will play a central role in driving the financial strategy for future growth to help bring this vision to life. Here's how we're already making a difference: To learn more about the support we provide — and how you could be part of it — please [click here](#).

Supported Living: Empowering Choice, Building Lives

Supported living gives people the freedom to live in their own homes and stay connected to their communities with flexible support designed entirely around them.

We work in close partnership with each person to create a personalised support plan, which is regularly reviewed together with the individual and the key people in their life, ensuring the support evolves as their goals and circumstances change.

We go far beyond support and care. We empower people to make decisions, pursue ambitions, and build real, lasting independence. Our teams work closely with individuals and those who matter most to them, co-creating personalised plans that adapt as goals evolve. It's about giving people control, confidence, and connection.

Community-Based Support: Living Fully Together

We support people to develop the skills and confidence to live life to the fullest. Whether it's managing daily routines, discovering new interests, making friends, or joining in with local life — our community-based support helps people explore what independence means to them.

This isn't just support — it's partnership, encouragement, and belief in each person's potential.

Residential Care: Quality, Not Quantity

We operate a small number of high-quality residential care homes, each supporting no more than six people. These homes provide warm, inclusive environments where people with complex needs can feel safe, respected, and supported to live their lives, their way.

Children and Young People's: Creating Brighter Futures

Established in 2018, the Children and Young People's Division is growing fast and making a powerful impact. We offer two specialist support arrangements:

Positive Behaviour Support (PBS)

Working with children and young people with complex needs, PBS helps reduce behaviours that challenge and enhance quality of life — all while aiming to prevent hospital or residential placements. Each practitioner works intensively with 1-2 young people over 24 months, creating personalised strategies that truly make a difference. These support pathways are currently available in Bradford, Wakefield, Greater Manchester/Lancashire, Gloucestershire, and Bristol.

Keyworking

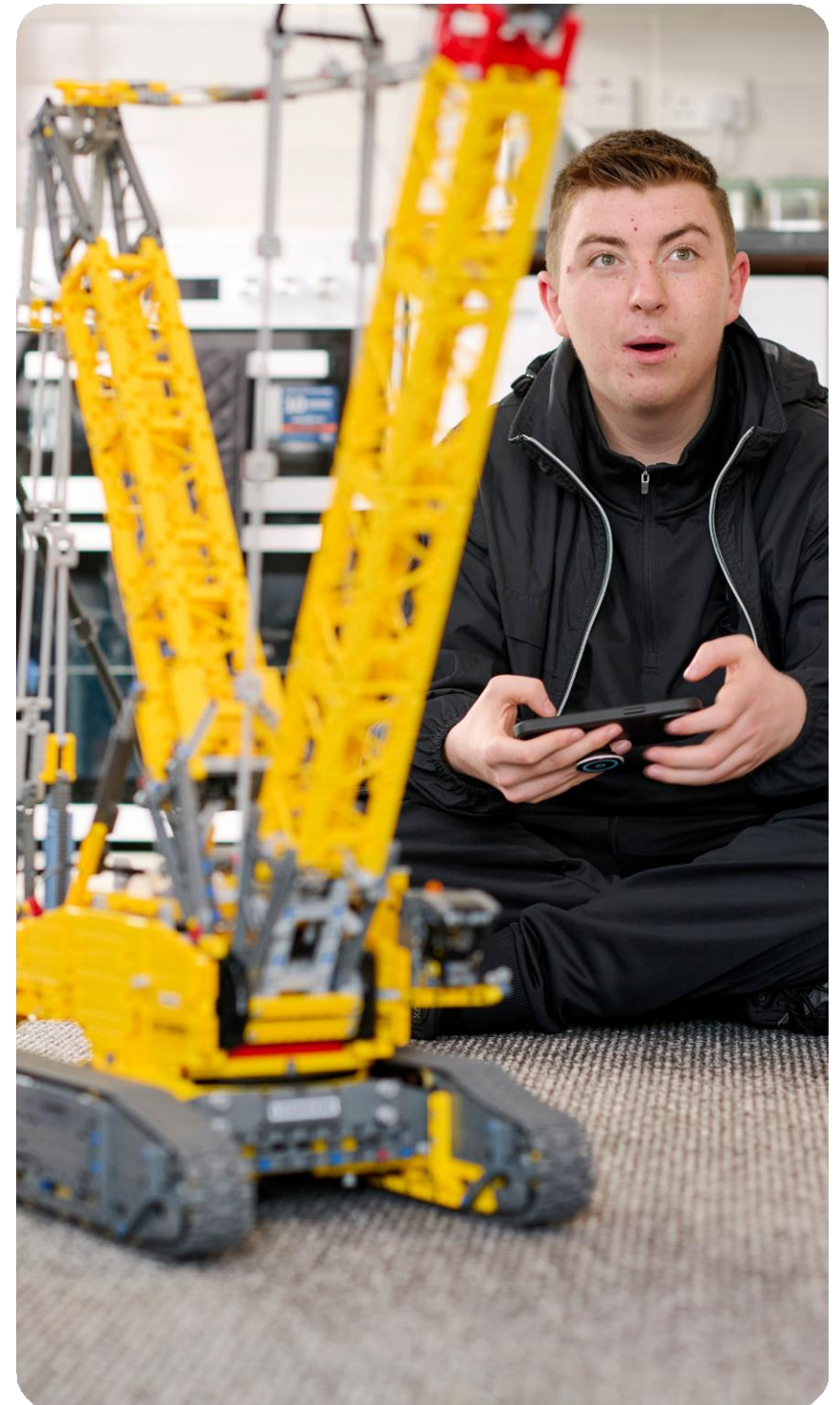
Our Keyworkers coordinate holistic, person-centred support for up to 10 children and young people at a time — ensuring that no young person falls through the gaps. From preventing hospital admissions to amplifying young voices, this support is all about building strong networks of care. Currently delivered in Derbyshire, it's already changing lives — and we're just getting started.

Looking ahead, the division has ambitious plans to expand its PBS and Keyworking footprint and to develop new initiatives.

This is a unique opportunity to strategically support more people through organic growth, acquisitions and partnerships.

This is the moment to join Affinity Trust and help us build on a proud legacy — while boldly shaping the future of support and inclusion. With innovation, heart, and strong operational leadership, we know we can do even more.

And with you on board, we will.



Finance; a strong foundation, an exciting future

Affinity Trust is in a position of real strength — and we're building from solid ground following a few years of significant investment in digital transformation. At the close of 2025/26, we finished the year with a small profit along with a healthy cash balance.

As we move through 2026/27, we are meeting our budget commitments and managing sector headwinds well and have identified opportunities for growth and efficiency which this role will be key in helping us achieve. We continue to enable strategic investments in what matters most:

- The majority of all our colleagues are already paid above the National Living Wage and we continue to enhance pay and recognition for our incredible Support Workers
- Launching a comprehensive management training programme to grow the next generation of inclusive, values-driven leaders
- Continued investment in quality assurance by growing our quality team

We're proud to be in the third year of our 2023–2028 organisational strategy, and even prouder of what we've achieved so far. Highlights include:

- Establishing a national co-production group with the people we support
- Completed the roll out of new Digital IT systems that empower our teams and streamline how we work
- Maintaining strong CQC and Care Inspectorate ratings across our registered provision
- Expanding our reach by securing new contracts and welcoming more people into our support
- Unveiling our new organisational values and visual identity, reflecting who we are and what we stand for

This is an exciting moment in Affinity Trust's journey — with strong leadership, financial stability, and a clear strategic direction, we are poised for meaningful, sustainable growth.

And to view our most recent annual report, please click [here](#).



Our Strategic Aims 2023-28

We are in the third year of our five year Strategic Plan, which sets out how we will continue to develop as an innovative provider of high-quality person centred support.

While working through the enormous challenges faced by the social care sector over the past few years, we have also undertaken a comprehensive review of all our systems and processes. This Transformation Programme has included the digitalisation of major systems for Operations, Rostering, HR and Finance resulting in an operating platform which will drive improvements to the delivery of support while creating a better working environment for our staff.

The challenges presented by the economy, the labour market and the underfunding of social care will continue to have an impact, as we look to deliver our strategy, but we are in a strong position to overcome these challenges and take the Affinity Trust forward with the people we support at the heart of all that we do.

Our five core aims below are the pillars of our strategy and will shape everything we do over the next five years:

Enable people to live great lives



- ✓ We will provide person-centred support driven by choice and opportunity for everyone, with regulator ratings of GOOD or better in both England and Scotland.
- ✓ Our technology will enable evidence of great outcomes for people we support.

Support more people to live at home



- ✓ We will help people to transition from hospital back into the community.
- ✓ We will increase the number of people living in their own home in communities of their choice.

Be a workplace where our people will grow and develop



- ✓ As part of our core values we will continue to be an inclusive and diverse workplace, and recruit more managers with protected characteristics.
- ✓ Through our investments in technology we will improve our employee experience.
- ✓ We will focus on the health and wellbeing of our people and provide continued development opportunities.

Actively partner, collaborate and



- ✓ We will be a collaborative and useful part for evolving health systems, local authorities and other providers to improve outcomes for people we support.
- ✓ We will advocate alongside the people we support and their families to transform social care policy and practice.

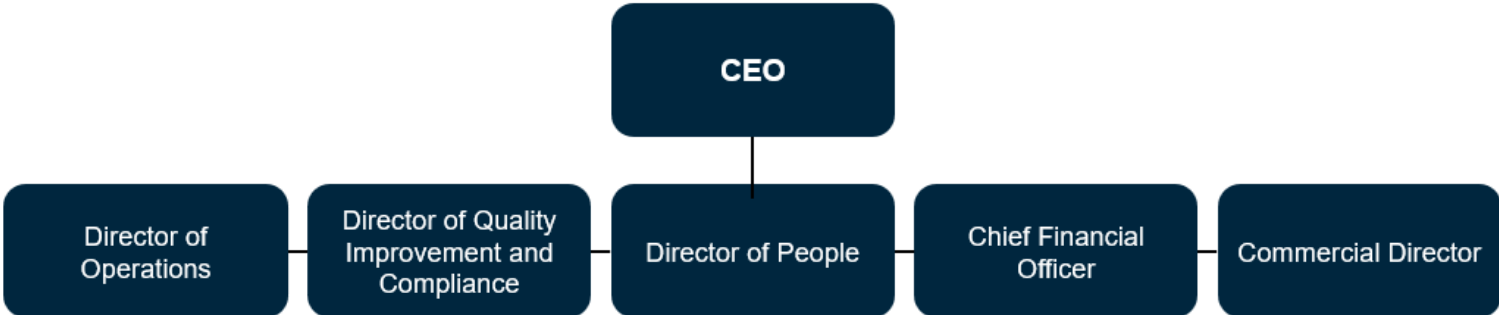
Be financially fit to meet our ambitions



- ✓ We will ensure financial sustainability and healthy reserves enabling us to continue to grow, innovate and invest to improve the lives of people we support.
- ✓ We will continue to find more efficient ways of working, making every pound count.

Our Executive Team

To learn more about our executive team please [click here](#).



Job Description

Job title:

Chief Financial Officer

Reports to:

Chief Executive

Responsible for:

Functional responsibility for the Finance, Payroll, Procurement, Performance and Business Intelligence, and Information Technology teams. Corporate responsibility for Data Protection and information governance, including acting as the organisation's Senior Information Risk Owner (SIRO), and executive responsibility for ensuring that financial insight, integrated management information, systems and performance reporting support effective decision-making, strong performance and long-term sustainability.

Role Purpose

The Chief Financial Officer will provide strategic and operational financial leadership to Affinity Trust, helping to ensure long-term sustainability, effective resource allocation and strong organisational performance. Reporting to the Chief Executive, the postholder will combine strategic financial planning with a hands-on, pragmatic approach, ensuring that finance, performance insight, systems and technology work together to support effective decision-making and better outcomes for the people we support.

Role Purpose Continued.

Working closely with the Head of Governance and Risk, the Chief Financial Officer will ensure that financial, technology and information risks within the postholder's remit are identified and managed effectively. They will be a key advisor to the Chief Executive, Executive Team and Board of Trustees, providing clear insight, constructive challenge and confident assurance on financial sustainability, liquidity, solvency, digital risk and organisational performance.

The Chief Financial Officer is a member of the Executive Team and plays a central role in strengthening financial discipline, organisational performance, integrated insight and the capability and resilience of the functions within the postholder's remit.

Main responsibilities

Strategic Leadership

- Act as a strategic partner to the Chief Executive, Executive Team and senior leaders, using financial insight, commercial judgement and constructive challenge to support sustainability, efficiency and improvement.
- Lead the development and delivery of the charity's financial strategy, ensuring alignment with the corporate strategy and clear priorities for value for money, productivity and effective resource allocation.
- Lead the development of a rolling 3–5 year strategic financial plan, including cashflow and balance sheet projections, to support long-term sustainability and going concern assurance.
- Provide independent financial challenge, modelling and assurance on new services, procurement, housing and investment decisions, ensuring that proposals and purchasing decisions support affordability, value for money, effective risk management and alignment with organisational priorities.
- Lead commercial finance activities, including pricing, modelling and financial viability assessment for tenders and contracts, ensuring proposals are sustainable and strategically aligned.
- Support the organisation to achieve measurable improvements in performance, productivity and value for money that strengthen sustainability, improve organisational effectiveness and increase impact for the people we support.

Accounting and Financial Controls

- Lead business development, including pricing and submission of successful tenders in collaboration with the Head of Bids and Tenders ensuring responses to tenders and growth initiatives are innovative, person-centred, and deliverable.
- Assess commercial and operational risks associated with tender and business development activity.
- Work closely with Divisional Directors and operational leaders to identify, assess, and shape opportunities with Local Authorities and Integrated Care Boards (ICBs) including negotiated commissioning.

Job Description

Treasury Management and Investment

- Oversee the effective management of cash and investments, including regular cashflow forecasting and investment of surplus funds within agreed risk parameters.
- Manage relationships with banking, investment and potential funding partners to ensure effective service, appropriate challenge and value for money, and to support future growth opportunities including housing and other new service lines.
- Provide strategic advice on treasury, investment and future financing options, including maintaining oversight of investment portfolios and preparing the organisation to secure appropriate funding for growth where needed.

Payroll and Pensions

- Oversee secure, accurate and efficient payroll services and compliance with legal and regulatory requirements, in close collaboration with finance and people teams.
- Champion a culture of continuous improvement to maximise payroll efficiency, accuracy and system-based processing with minimal manual intervention.
- Ensure payroll processes are resilient, with documented procedures, trained deputies and effective handover arrangements to avoid single points of failure.

Governance and Reporting

- Act as a trusted advisor to the Chief Executive, Executive Team, and Board of Trustees on finance, performance and technology matters, presenting complex issues clearly and with confidence.
- Provide clear, timely and insightful reporting linked to the organisation's strategic objectives and KPIs, and strengthen the quality of management information available to Executive and operational leaders.
- Lead the development of integrated financial, operational, workforce and quality insight, including dashboards and reporting that support accountability and decision-making from Board to Executive and management levels.
- Ensure that financial, systems and reporting arrangements provide operational leaders with the insight and assurance needed to sustain safe, high-quality and financially sustainable services.
- Strengthen financial literacy, accountability and business partnering across the organisation so that leaders are better able to access, interpret and use financial, operational and quality information to improve decision-making, performance and accountability.
- Act as the organisation's Senior Information Risk Owner (SIRO), ensuring appropriate oversight of information risk, cyber security, data protection and related assurance arrangements.
- Identify and manage financial, technology and information-related risks within the postholder's remit, ensuring these are appropriately escalated and reflected through the organisation's risk management framework in collaboration with the Head of Governance and Risk.
- Champion best practice in GDPR compliance, data protection, and information security, acting as the organisation's senior lead for these areas.

Digital and Technology Strategy

- Provide strategic direction for technology infrastructure, data management and cyber security, ensuring systems are secure, resilient, scalable, cost-effective and user-focused.
- Lead delivery of the organisation's digital and technology strategy, including systems rationalisation, improved integration and digital solutions that enhance productivity, data quality and decision-making.
- Oversee the safe and effective adoption of AI tools and use cases in line with organisational policy, with appropriate controls, governance and training.
- Ensure core systems, data and reporting arrangements are well connected, practical for users and aligned to organisational priorities, so they support more consistent, efficient and scalable ways of working across the organisation.
- Oversee the effective management of technology suppliers and partners, driving value, accountability and service resilience.

Team Leadership

- Build, lead and develop the finance, payroll, performance and technology teams, including establishing new capability where required, fostering a high-performance culture of collaboration, accountability, continuous improvement and strong internal customer service.
- Ensure that procurement activity within the postholder's remit is aligned with financial controls, value for money and organisational priorities.
- Build and lead strong, credible and high-performing functions across the postholder's remit, ensuring each has the capability, structure, resilience and ways of working needed to meet current and future organisational needs.
- Strengthen capability, succession planning and leadership across the functions within the postholder's remit, reducing dependency on single points of failure and improving responsiveness.
- Work closely with operations and other corporate functions to strengthen business partnering, support informed decision-making and improve organisational performance through shared accountability for delivery.

Person Specification

About You

You will be a qualified accountant with senior leadership experience in a complex, multi-site organisation. You may have worked in the charity, public or private sector, but you will bring strong financial and commercial acumen, sound judgement and the credibility to operate effectively at Executive and Board level from the outset. You may already be operating at CFO, deputy CFO or equivalent executive level in a larger organisation, or you may bring broader senior leadership experience from a smaller organisation, with the breadth and maturity to step quickly into this role. Experience of working in a large operational environment, with substantial service delivery teams across multiple locations, will be important.

You will combine strategic thinking with a practical, delivery-focused approach. Comfortable moving between long-term planning and operational detail, you will build strong relationships across the organisation and use data, systems and insight to strengthen decision-making, accountability and performance. You will also be effective at working across functions, building capability in others and supporting shared ownership of delivery, including working closely with leaders whose primary focus is operational performance rather than finance.

Your leadership style will be collaborative, grounded and values-led. You will bring pace, energy and resilience, alongside the ability to build confidence, strengthen capability and lead high-performing teams through change and growth.

Skills and Experience

- Proven senior finance leadership in a complex, multi-site organisation with substantial operational teams, and a track record of contributing to organisational growth, sustainability and stronger organisational performance.
- Experience of leading strategic financial planning and analysis along with financial control functions, with evidence of strengthening capability, improving ways of working and building high-performing teams.
- Experience of delivering measurable improvements in efficiency, productivity, value for money or organisational performance while maintaining a focus on quality and organisational impact.
- Experience of treasury management, including oversight of investment portfolios and the ability to provide sound advice on liquidity, risk and the management of surplus funds.
- Experience of working with banks, funders or other financing partners, including debt financing or comparable arrangements, to support organisational growth and strategic investment.
- Experience of developing high-quality management information, performance insight or business intelligence to support decision-making.
- Experience of working collaboratively at Executive Team and Board level, with the confidence to challenge constructively and influence decision-making.

Person Specification

- Strong commercial and financial acumen, with the ability to combine strategic thinking with operational grip and sound judgement.
- Experience of supplier, systems or other third-party contract oversight, with the ability to apply sound commercial judgement, maintain appropriate oversight and secure value for money.
- Ability to translate complex financial and performance data into clear insight, practical recommendations and meaningful management information.
- Strong business partnering and stakeholder management skills, with the ability to work effectively with operational leaders and across a wide range of business functions in a substantial service-led organisation.
- Experience of managing financial, technology and information-related risks within an organisational governance framework.
- A collaborative, values-led and pragmatic leadership style, with the ability to operate with pace, resilience and sound judgement.
- Excellent communication skills, with the ability to engage, influence and build confidence at all levels.

Desirable Skills and Experience

- Previous experience of senior leadership roles gained in the charity sector.
- Previous experience of contracted service delivery in adult social care.
- Experience of finance transformation, systems improvement or strengthening finance business partnering.
- Experience of developing performance dashboards, business intelligence capability or integrated management information.
- Experience of digital, data or cyber-related change programmes.
- Broader leadership experience beyond finance, such as digital, governance, legal or procurement-related oversight.

Qualifications

- Qualified accountant (CCAB or equivalent recognised professional accountancy qualification).
- Evidence of ongoing professional development in leadership, strategic finance and related areas.

Other

- Professional and values-led role model, able to act as a credible ambassador for the organisation.
- Willingness to travel nationally and stay overnight when required.

Terms of Appointment

Salary

The salary for this role is c. £130,000 + £6,200 car allowance (depending on experience)

Location

Hybrid with at least 2 days per week in the office (Thame or Leicester), with regular nationwide travel. The Executive Team meets fortnightly in Thame.

Pension

Up to 6% employer contribution where the employee contributes 3% and 8% where the employee contributes 4% and above via salary sacrifice.

Annual leave

38 days annual leave (including bank holidays).

Additional benefits

Life insurance, blue light discounts, more rewards and benefits can be viewed [here](#).



How to Apply

If you would like a confidential conversation about the role, please do get in touch with our advising consultants, Moloney Search, at affinitytrust@moloneysearch.com or 0207 368 5100.

We're delighted that you're considering this opportunity to join Affinity Trust at such an inspiring and forward-looking moment in our journey. If you're passionate about making a real difference, driven by purpose, and ready to help shape the future of support for adults, children and young people with learning disabilities and autism, we would love to hear from you.

To apply, please email: affinitytrust@moloneysearch.com. You will be asked to submit the following:

- Your CV
- A supporting statement (maximum two sides) outlining why this role is the right next step for you, and how your experience aligns with the knowledge and criteria set out in the person specification.

As part of this application process, we ask that you complete the Equality and Diversity Monitoring Form. This information is used for monitoring purposes only, remaining fully confidential and will not form part of the selection process.

We look forward to receiving your application and learning more about what you can bring to this important leadership role at Affinity Trust.

Date

w/c 13th July

w/c 10th and 17th August

w/c 24th August

Action

Closing Date

Informal conversation with Kerry Dearden, People we Support Panel, assessments. Optional fireside chat with Director of Operations and Commercial Director.

Presentation and Panel Interview

*This Timetable is indicative and subject to change

