



## **Fairfield Residential Home**

### **Appointment of Part-time Bursar (0.6 FTE)**

#### **Candidate Brief**



**April 2020**

## **Background**

Fairfield Residential Home is an independent charitable trust providing care and assistance to elderly residents in a unique and supportive environment. Founded in 1947, it has a long-standing reputation for delivering excellent standards of care. Initially established in a large Victorian house at 115 Banbury Road, Oxford, it now has new facilities in a purpose-built state of the art facility, completed in the summer of 2018. These were built on land comprising the Staverton Annex of University College, Oxford. The project was part of an innovative transaction between these two institutions who have lived side-by-side in harmony for over 40 years.

Fairfield is noted for the love and affection in which it holds its residents and for its committed team of carers and support staff who contribute to the distinctive atmosphere. All employees are expected to enhance and promote this ethos.

The new building provides 38 en-suite bedrooms, some of which are suitable for couples, and high-quality communal facilities including a large lounge, a dining room, a fully equipped activities suite with IT, wellness and beauty rooms as well as a large landscaped garden.

Fairfield is owned by a charitable company and is governed by a Board of Trustees. It is registered with the Charity Commission No. 1114653. It reported total income of £891,609 for the year ended 30 September 2018, and total funds of £7,635,828, substantially all of which were unrestricted. The accounts for the year ended 30 September 2019, which will show a significant increase in total income, will be approved and published in May. Fairfield employs some 45 staff.

Fairfield is regulated by the Care Quality Commission (CQC). It was rated Good by the last CQC inspection report dated March 2018.

Further information on Fairfield can be found at [www.fairfieldhome.co.uk](http://www.fairfieldhome.co.uk)

Fairfield now seeks to appoint a Bursar in a newly configured role created to support the outstanding care provided to its residents. This is a part-time role which it is estimated can be discharged based on a three-day week (0.6 FTE). The Trustees seek an experienced and caring leader, committed to the principles of distributed leadership, able to work collaboratively, and to build upon the existing strengths of a committed team.

## **Role Description**

The successful candidate will have experience of managing finances and budgets in a people-facing organisation and be committed to applying those skills within the community of Fairfield; but the role is wider than this. The Bursar will have overall responsibility for the estate and administration of the organisation, with a key focus on supporting the Director of Care to enable Fairfield to be outstanding. S/he will be committed to maintaining the ethos of Fairfield amongst staff and residents, leading by example.

The key responsibilities of the role are:

### **1. Strategy and Policy**

- a) In consultation with members of the Senior Leadership Team, make proposals concerning the future development of Fairfield and prepare a rolling three-year development plan for approval by the Trustees;
- b) Develop a financial policy and strategy to be approved by the Trustees, and prepare financial plans, with sensitivity analyses, consistent with the development plan;
- c) Identify the Trustees' risk appetite and maintain and oversee the risk register, including the identification and mitigation of risk;
- d) Maintain and develop an approach to supported self-evaluation as a strategy for quality improvement throughout the organisation.

### **2. Finance**

- a) In consultation with the Director of Care, recommend annually the level of fees and prices charged for the provision of residential care and oversee its efficient collection, as well as supervise the issue of applicable contracts to residents.
- b) Manage Fairfield's funds, including timely investment of cash balances, and prepare and monitor budget and spending reports for budget holders and committees as required;
- c) Prepare quarterly management accounts for the Finance Committee and Trustees;
- d) Prepare the Annual Financial Statements (and Report, in consultation with the Director of Care), in accordance with the Charity Commission Statement of Recommended Practice (SORP), for presentation to the Finance Committee and approval by the Trustees;
- e) Recommend to the Finance Committee the levels of pay and other benefits, including pensions offered to staff. Oversee the administration of salaries, taxation, pensions and other benefits (including related HR matters, contracts of employment, administration of sickness policy etc.);
- f) Ensure donations and gifts are properly accounted for and tax is claimed on gift aided donations;
- g) Liaise with the Health and Wellbeing Committee and Director of Care to ensure the correct allocation of charitable funds.

### **3. Estates Management**

- a) Manage the upkeep of the Fairfield building and maintain a development strategy consistent with the three-year development and financial plans; observe all relevant internal and external legislation, codes and guidelines;
- b) Liaise with the Fellows and Staff of University College to foster a commensal relationship, as the site shared between Fairfield and the College is developed;
- c) Propose to the Estates Committee major and minor buildings projects. Manage such projects from the preparation of business cases to the timely delivery of project objectives within agreed budgets;
- d) Ensure the proper implementation of all relevant Health & Safety legislation and make arrangements for the deployment, testing, monitoring and audit of related procedures and processes;
- e) Negotiate with service providers and external contractors for services to Fairfield, ensuring that value for money is obtained, and maintain oversight of their work;
- f) Manage the estates team, in close association with the Clerk of Works, and ensure appropriate resourcing and training;
- g) Propose to the Estates Committee, introduce and embed sustainability principles in all aspects of Fairfield estates management

### **4. Reporting and Regulatory Compliance**

- a) Ensure that Fairfield complies with charity law, reporting to the Charity Commission and Companies House on a timely basis;
- b) Support the Director of Care in ensuring compliance with CQC care and audit requirements under the Health and Social Care Act 2008;
- c) Deal with HM Revenue and Customs in relation to taxes and the local council regarding local taxes, planning issues, and the electoral roll;
- d) Facilitate annual external audit, and internal audit as required by the Trustees, in addition to the clinical audit requirements under (4b) above;
- e) Provide Trustees with timely reports on a quarterly and annual basis.

## **5. Administrative and Personnel Management**

- a) Maintain good working knowledge of current and proposed employment legislation, encouraging best practice and promoting equality and diversity;
- b) Oversee line-management of all non-care administrative and support staff, including their performance appraisal;
- c) Select and employ consultants on matters of specialist input;
- d) Ensure that property, personnel and activities are properly insured.

The Bursar will undertake such other duties as the Chair of Trustees will from time to time determine.

### **Person Specification**

The post calls for someone with experience of financial management at an appropriate level, together with financial acumen and initiative. A knowledge of estates management would be an advantage. The ideal candidate will have a recognised accountancy qualification, but this is not a strict requirement. Excellent communication and team-working skills are important; Fairfield particularly values open communication and an attentive and collaborative approach. In addition, some understanding of, and sympathy for, the structure and workings of care homes would be desirable.

Applications for this appointment will therefore be assessed against the following competences:

- **Experience and Skills**
  - i. significant financial management experience at a level consistent with the scale and complexity of Fairfield;
  - ii. experience of managing people;
  - iii. experience of setting and managing budgets;
  - iv. knowledge of estates management and practice;
  - v. experience of leading small, multi-disciplinary teams across the care and non-care agenda; and
  - vi. an understanding of the implications of Fairfield's charitable status.
- **Personal Qualities**
  - i. strong relationship skills;
  - ii. an ability to deploy business skills and experience in a collegiate and collaborative manner with the Trustee Board;
  - iii. a willingness and an ability to work in a collegiate and collaborative manner with all members of staff, residents and stakeholders;
  - iv. a clear and confident communicator, especially able to communicate complex financial issues concisely and with clarity to colleagues who are not financially experienced;

- v. the ability to communicate effectively both orally and in writing, and to gain the confidence of a wide range of people, within and beyond Fairfield;
- vi. highly developed negotiating and interpersonal skills, and the ability to demonstrate a diplomatic and consensual approach to problem-resolution, allied with an understanding of sensitive and confidential matters;
- vii. intellectually strong, and able to command the respect of all colleagues; and
- viii. with a commitment to the ethos and vision of Fairfield.

## Remuneration

The post of Bursar is a part-time role which it is estimated can be discharged based on a three-day week (0.6 FTE). A competitive remuneration package will be offered.

## Application Process

The Trustees are being advised by Bridgewater Leadership Advisory in this appointment.

To obtain further information on the role, or for an informal discussion about the opportunity generally, please contact:

Anthony Archer      07721 504125      [anthony.archer@bridgewaterleadership.co.uk](mailto:anthony.archer@bridgewaterleadership.co.uk)

To apply, please email a CV and short covering letter to [postofbursar@fairfieldhome.co.uk](mailto:postofbursar@fairfieldhome.co.uk) by **Friday, 15 May**, with a copy to [anthony.archer@bridgewaterleadership.co.uk](mailto:anthony.archer@bridgewaterleadership.co.uk)

All applications will be acknowledged within 24 hours.

Interviews will be held in Oxford on a date yet to be announced during June.

The Trustees have formed an Appointments Group to assist with this appointment, chaired by John Guy OBE, Chair of Trustees. Candidates who have been shortlisted for interview will be informed as soon as possible, and no later than 22 May.

Fairfield reserves the right to approach potential candidates who have not applied before the closing date.

***The timetable for this appointment does not fully consider the impact of the COVID-19 pandemic. The recruitment process will be progressed so far as possible through videoconferencing (with Zoom being the preferred software). Candidates will be kept closely informed of relevant developments.***

**1 April 2020**