



Since 1355

Supporting people | Strengthening communities

Director of Finance & Corporate Resources

Recruitment Pack

Spring 2026





Welcome to MY Trust

Thank you for your interest in this exciting senior leadership opportunity.

MY Trust has entered a bold new chapter. On 1 April 2026, two of the West Midlands' most historic charitable organisations came together in a merger that brought nearly 1,000 years of charitable legacy into a single, forward-looking trust. This is a rare opportunity to join the organisation at a pivotal moment and help shape its long-term sustainability, governance and impact.

The role of Director of Finance and Corporate Resources is a key appointment, made as our current Director prepares to retire after a successful period of service. Reporting to the Chief Executive and working closely with the Board of Trustees, you will play a central role in shaping MY Trust's financial resilience, governance and future growth. As a member of the Senior Leadership Team, you will provide strategic leadership across finance, risk, ICT and corporate services, supporting the organisation through its post-merger phase and beyond.

We are committed to equality, diversity and inclusion and believe that diverse leadership strengthens decision-making and innovation. We particularly encourage applications from candidates who are currently under-represented at senior leadership level.

At a time of significant challenge and change for the charity sector, this role sits at the very heart of MY Trust, helping to ensure we can continue making a meaningful difference to hundreds of people each year. We hope this pack gives you a clear sense of the opportunity and encourages you to consider applying.



David Healey
Chief executive



Rachel Chiu
Chair of Board

About Us

We are MY Trust: a family of charities & two small Registered Social Landlords serving the West Midlands.

We want everyone to have a safe place to call home, to feel part of a thriving community & to live well.

With a turnover of c£8 million, the services we provide include safe, affordable and well-maintained alms-housing, residential nursing care, community and housing related support, services and housing for children and young people and grants to individuals and community organisations.

Everything we do is rooted in our 670 year history and driven by our vision for the future.

Our Vision

Everyone has a safe place to call home, feels part of a thriving community & lives well.



Our Mission

We create opportunities for people & communities to thrive by providing meaningful support, compassionate care and quality homes.

Our Values

Compassion: We strive to understand each person's journey and to treat them with dignity & respect.

Inclusivity: We value every individual and embrace diversity.

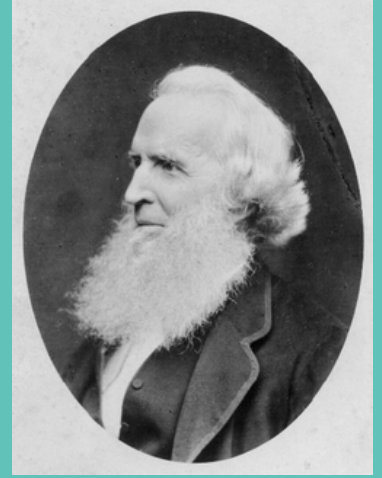
Trust: We are transparent, reliable, and accountable in all that we do

Excellence: We strive to be the best for the people we serve.

About our past

Sir Josiah Mason Trust

Sir Josiah Mason Trust was formally established in 1868 by Birmingham industrialist and philanthropist Sir Josiah Mason, whose philanthropy was rooted in a profound concern for those left without security, support or opportunity.



Central to Mason's vision were the creation of almshouses for older people and an orphanage for children without family support, providing not simply shelter, but dignity, stability and care. At a time when social safety nets were scarce, these institutions offered lifelong security to those who were most vulnerable within society.



In recent years, Sir Josiah Mason Trust acted as steward to a number of historic charities with closely aligned purposes, including Holy Trinity Heath Town Charity, Holte & Bracebridge Charity, Thomas Banks Almshouses and Oak Tree House Trust. Whilst now part of MY Trust each retains its own distinct history.

Yardley Great Trust

The Yardley Great Trust Group is rooted in nearly 700 years of local generosity, with its earliest foundations dating back to 1355, when land held by Thomas de Yerdley, Bailiff of Maxstoke Priory, was granted under charter on his death to be held in trust for the benefit of the parish.



Over the centuries, successive benefactors added almshouses, bread charities, clothing funds and schools, sustaining generations of local people long before the development of any formal welfare system. By the twentieth century, the Yardley charities had evolved to meet changing needs, expanding into residential and nursing care. In recent years, charities such as Colehaven, Grey Gables and Carrs Lane Homes joined the Trust. Though founded separately, these charities shared a common commitment to providing secure, dignified homes and compassionate care, and were eventually brought together under modern governance as the Yardley Great Trust Group and continue today as MY Trust.

Working for MY Trust

Salary: £75,000

Hours per week: 35 hours per week

Location: Main Office in Olton (B27 6PF) with some home working

Additional benefits

- Starting on 31 days holiday inclusive of Bank Holidays (increases with service)
- An annual 'wellbeing' day for all staff
- Company sick pay
- Free onsite parking
- Pension scheme
- Life Insurance
- Refer a Friend incentive scheme
- Funded Blue Light Card membership
- Wisdom: guide to health and mental wellbeing
- Health Assured: Employee Assistance Programme inc. access to external support and counselling
- Bright Exchange: perks and benefits from a range of retailers including well known brands
- Training opportunities for professional qualifications



JOB DESCRIPTION

JOB TITLE: Director of Finance and Corporate Resources

RESPONSIBLE TO: Chief Executive

RESPONSIBLE FOR: Management Accountant, Finance Manager, Office Manager.

PURPOSE OF JOB

To provide strategic leadership and oversight of MY Trust's finance and corporate services, ensuring the organisation operates on a financially sustainable, well-governed and compliant basis.

Reporting to the Chief Executive and accountable to the Board of Trustees, the Director of Finance and Corporate Resources will lead the development and delivery of the Trust's financial strategy and corporate services, including finance, ICT, risk management and key supporting functions.

As a member of the Senior Leadership Team, the postholder will contribute to organisational strategy, support growth and innovation, and ensure the Trust meets all statutory, regulatory and governance requirements while delivering high-quality services to stakeholders.

KEY DUTIES & RESPONSIBILITIES

Executive Leadership, Financial Strategy and Control

- To work with the Chief Executive, Senior Leadership Team and Board to shape, develop and deliver robust corporate, strategic and financial business plans, ensuring organisational priorities, objectives and targets are achieved in a financially sustainable and compliant manner.
- To provide strategic leadership across finance and corporate services, acting as an ambassador for MY Trust's values and fostering a positive, high-performance culture that supports effective leadership, collaboration and staff engagement.
- To lead the development and delivery of long-term financial strategy, including annual budgets, financial modelling, scenario planning and the preparation of monthly management accounts and statutory accounts in accordance with Charity and RSL SORP requirements.
- To ensure effective financial stewardship, maximising income within statutory and policy constraints, maintaining appropriate reserves, and overseeing treasury activities, including relationships with investment managers, to ensure optimal performance and risk management.

- To establish and maintain robust systems of financial control, governance and reporting, ensuring timely and accurate financial and performance information is provided to the Senior Leadership Team, Finance & Governance Committee and Board of Trustees.
- Team, reporting key risks and mitigations to the Board.
- To oversee the procurement of goods and services across MY Trust, ensuring value for money and compliance with relevant policies and regulations.
- To ensure the effective management of central administration and corporate support functions, including responsibility for fit-for-purpose financial systems and compliance with all legal, regulatory and taxation requirements.

Governance and Decision-Making

The Director of Finance and Corporate Resources will:

- Act as the organisation's senior financial adviser to the Chief Executive and Board
- Have delegated authority for day-to-day financial and corporate services operations
- Make recommendations to the Board and relevant committees on financial strategy, budgets, reserves, treasury and risk
- Ensure appropriate separation of executive management and trustee oversight in line with charity and housing governance best practice
- To lead the development and maintenance of risk management strategies and risk registers across MY Trust – including financial audit frameworks, procedures and appraisal systems for capital projects and all other significant areas of risk.

Treasury

- To develop and maintain a Treasury Management policy and strategy to ensure availability of and flexibility of funding to support achievement of strategic objectives and reduce exposure to any particular risk.

Human Resources and People Management

- To support the development, implementation & review of an effective People Strategy which supports the vision and values of each Trust, and which embraces best practice in recruitment, induction, training and development.
- To develop a team approach across Finance and Corporate Services, leading staff by example, and ensuring that staff are developed, and have the competencies to deliver a high-quality service to the organisation.
- To oversee and support the administration of all statutory returns and sector relevant returns/surveys, ensuring that they are completed as required.
- To support the Chief Executive and the SLT on the annual remuneration Review and to present to the Board and relevant sub-committees for approval To oversee the outsourced payroll and workplace pension schemes & other pension arrangements.



ICT

- To lead on the development and delivery of an effective ICT and Telecoms Strategy for MY Trust. This should support mobile and agile working, customer relationship management that underpins our drive for excellent business performance and which supports a culture of continuous improvement.
- To oversee the relationship with the outsourced IT support provider, ensuring optimal support to staff, and monitoring performance against contract.
- To work with and develop use of financial accounting software and other software as required to meet the operational and strategic development needs of the business
- To ensure adequate disaster recovery plans are in place to ensure the charity can continue to function effectively
- To ensure that the charity identifies and mitigates against cyber risk



PERSON SPECIFICATION

Key Requirements


Experience

- Proven experience at a senior leadership level in a finance environment. Charity and or Housing Association experience is essential.
- Experience of preparing financial business plans, modelling scenarios and carrying out sensitivity analysis and stress tests.
- Track record of delivering on a range of other corporate support services such as IT, HR and Governance in addition to financial responsibilities would be an advantage.
- Experience of developing services to achieve and support strategic organisational objectives.
- Proven experience of leading teams through change, delivering consistent services with excellent results and maintaining high levels of staff engagement.
- Experience of managing investment portfolios.

Knowledge / Skills and Qualifications

- A skilled influencer and negotiator able to communicate effectively with external stakeholders, customers, colleagues and Board members to include report writing and presentations
- Strong financial reasoning, highly numerate and IT literate
- Up to date knowledge of all regulatory requirements including: finance, people, IT & governance
- Knowledge of the Housing Sector and its current issues
- Proven ability to analyse and solve complex problems
- Commercial awareness
- Strategy & policy development
- Planning and organising
- Budget management
- Able to work under pressure to cost and time deadlines
- Relevant professional financial qualification and equivalent senior finance experience, with a strong understanding of governance and regulatory requirements. Membership of a recognised UK professional body and sector-specific knowledge desirable.

Other

- Able to demonstrate you share the values of MY Trust.
 - Ability to attend evening meetings and work occasional weekends
 - Commitment to equality and diversity
 - Current, valid UK driving license
 - Entitled to work in UK
 - Undertake any other duties within the spirit of this role as required by the CEO
- 

How do I apply?

If you would like to discuss the role informally or would welcome further information, please contact the Chief Executive, David Healey, on 0121 245 1002 or via email at enquiries@mytrust.org.uk.

Applications should include:

- A cover letter (no more than two sides of A4) outlining why you believe you are well suited to the role, and
- A current CV

Please submit your application by email to enquiries@mytrust.org.uk no later than 31 May.

The Trust reserves the right not to proceed with this appointment, to amend the selection process, or to conclude the recruitment at any stage.

We would be delighted to hear from you and thank you for your interest in this opportunity.

