

## Financial Controller

Combe Grove is a centre for advanced health and wellbeing in the UNESCO World Heritage City of Bath. An innovative, dynamic and friendly business Combe Grove is highly focused on delivering the charitable objectives of its guardian the Elmhurst Foundation.

Combe Groves pioneering work in Metabolic Health provides unique programmes with evidence-based education, personalised support and nurturing community environment which empowers individuals to be able to reset their health with medically measurable and sustainable changes.

### **About the role**

As Financial Controller for Combe Grove you will oversee accounting and financial operations, ensuring robust control systems deliver commercial, timely and accurate financial information to all users in the business enabling appropriate monitoring and control. Ensuring that all financial and tax reporting is completed to a high standard and to agreed timelines.

You will also support the Managing Director on a day-to-day basis and ensure a client focussed culture with a strong emphasis on driving sales and profitability with managed cashflow. With a team of 2 direct reports you will be responsible for the month end process, manage budget and forecasting process and be responsible for payroll. This role is a parttime position of 24 hours each week.

### **About You**

Driven and highly organised with a commitment to the highest standards of accuracy and attention to detail whilst working systematically. An effective communicator who is confident, enthusiastic and approachable with persistence to see a job through. You must be precise and work in a methodical and structured manner, whilst being perceptive and having strong problem solving skills.

## **Principle Duties and Responsibilities**

### **Financial Management & Reporting**

- Oversee all day-to-day finance operations, including accounts payable/receivable, payroll, cash flow, and banking.
- Prepare timely monthly management accounts, financial statements, and reports for the CEO and Board of Trustees.
- Maintain accurate financial records in accordance with applicable accounting standards (e.g., UK GAAP, Charities SORP).
- Lead year-end processes and coordinate with external auditors.
- Produce insightful financial analysis to guide strategic decision-making.

### **Budgeting & Forecasting**

- Develop annual budgets in collaboration with department heads (retreats, wellness centre, facilities, education, etc.).

- Deliver rolling forecasts and scenario modelling to support operational planning.
- Monitor performance against budget; identify variances and recommend corrective actions.

### **Charity Governance & Compliance**

- Ensure the charity complies with HMRC, Companies House, Charity Commission, data protection, and other regulatory requirements.
- Maintain and update internal financial policies, procedures, and controls.
- Prepare financial sections of Trustee Board papers and present where required.
- Oversee proper handling of restricted/unrestricted funds, grant claims, and donor reporting.

### **Operational & Commercial Support**

- Support pricing models for metabolic retreats, membership tiers, wellness services, and new initiatives.
- Partner with operational leads to improve cost efficiency across facilities (e.g., utilities, maintenance, equipment).
- Analyse profitability of programmes and make recommendations for improvement.
- Contribute to strategic planning for expansion of services and capital projects.

### **Systems & Process Improvement**

- Oversee the finance system (e.g., Xero or equivalent) ensuring accurate configuration and use.
- Streamline financial workflows, strengthen internal controls, and embed best practice.
- Introduce KPIs and dashboards to track organisational health.

### **Team Leadership**

- Manage and develop finance staff, external bookkeepers, or contractors as required.
- Promote a culture of financial awareness and accountability across the organisation.

### **I.T**

- Experience and a strong interest in IT is essential to ensure that efficiencies are made where possible
- Take responsibility for the successful running of Combe Grove's IT systems and to lead on all matters relating to IT
- Develop and improve Combe Grove's IT systems in conjunction with the external systems support company

## **PERSON SPECIFICATION**

### **Essential Qualifications & Experience**

- Fully qualified accountant (ACA, ACCA, CIMA, or equivalent).
- Experience as a Financial Controller or senior finance manager.
- Demonstrable experience within a charity, social enterprise, hospitality, or leisure/health & wellness sector.

- Proven experience managing budgets, preparing management accounts, and supporting strategic decision-making.

### **Skills & Competencies**

- Excellent analytical skills with strong attention to detail.
- Proficiency with accounting software and financial reporting tools.
- Strong communication skills, able to explain financial concepts to non-financial colleagues and trustees.
- Ability to work independently, prioritise effectively, and manage multiple projects.
- High integrity, aligned with the values and charitable mission of Combe Grove.
- Leadership skills with a strong emphasis on training, coaching and development of degree-level apprenticeships

### **Desirable**

- Experience in facilities-based organisations (e.g., gyms, wellness centres, hospitality).
- Knowledge of grant management and fundraising processes.
- Interest in metabolic health and lifestyle medicine.

### **Contacts**

- Managers and Staff across the organisation.
- Clients

### **Special Note**

This job description does not form a part of the contract of employment but indicates how that contract should be performed. The job description will be subject to amendment in the light of experience and in consultation with the post holder.

### **No Smoking Policy**

Combe Grove operates a No Smoking Policy for all team members and therefore smoking is not allowed on any part of the estate.

### **Confidentiality**

All of the work relating to students, teachers, donors, staff and volunteers and any other information gained is of a confidential nature and must not be communicated to other persons except in the course of duty.

### **Health and Safety at Work Act**

It is the responsibility of all team members to ensure that the requirements of the Health and Safety at Work Act are complied with, safe working practices are adhered to, and that hazards are observed and reported to the appropriate office.