

TATA TRUSTS

Role Details		
1.	Role	Trusts, Operations & Compliance Manager
2.	Grade	Equivalent to Grade 3
3.	Function Sub-function	Finance, IA, SCM, Admin
4.	Location	Mumbai
5.	Nature of Employment	Fixed Term Employment (FTE - 3 years)
6.	Reporting to	Senior Advisor

Role Overview:

The Trusts Operations & Compliance Manager will be responsible for overseeing the activities of the Smaller Trusts assigned to him/her, ensuring the optimal use of its financial resources, and ensuring strict adherence to relevant regulations and compliance requirements. This role will combine strategic financial planning with operational oversight, ensuring that the Trust's resources are used effectively while maintaining transparency, compliance, and alignment with the Trust deed and applicable legal frameworks.

Key Responsibilities:

	Trust Deed Management: <ul style="list-style-type: none"> Study and interpret the Trust deed, identify and address areas requiring updates or clarification, ensure all operations align with the deed's provisions
	Trust Activity Review & Financial Planning <ul style="list-style-type: none"> Regularly review and assess the Trust's financial performance, ensuring alignment with the Trust's objectives, deed, and strategic goals. Develop and maintain a comprehensive financial plan for the Trust, ensuring efficient use of its resources while meeting both short-term and long-term objectives. Review and validate land and lease records, ensure proper documentation and compliance. Analyse financial statements and performance metrics, advising senior leadership on improvements and potential risks. Oversee cash flow management, ensuring liquidity for operational needs and alignment with charitable objectives.
	Financial Reporting & Strategy <ul style="list-style-type: none"> Lead the preparation and presentation of accurate financial statements (monthly, quarterly, annual) in compliance with charitable sector regulations. Ensure full compliance with accounting standards, regulatory requirements, and donor as applicable reporting obligations, as applicable. Provide strategic insights on budgeting, forecasting, and financial performance to support organizational goals and sustainability.
	Operational Oversight & Reporting <ul style="list-style-type: none"> To review Trusts operations periodically. Ensure operational processes and financial operations are transparent, accurate, and aligned with both regulatory and internal guidelines. Identify areas where operational processes could be improved to increase efficiency and reduce financial risk.
	Compliance & Risk Management <ul style="list-style-type: none"> Ensure compliance with all financial regulations, tax laws, and charity-specific accounting and reporting requirements. Manage internal and external audits, ensuring timely and accurate documentation to uphold trust and donor confidence. Implement risk management practices to protect organizational assets and ensure adherence to governance policies.
	Stakeholder Communication & Reporting <ul style="list-style-type: none"> Communicate operational and financial performance including funding status clearly to trustees, donors, stakeholders, and auditors, ensuring transparency. Serve as the primary point of contact for all inquiries associated to donations, grants, and regulatory matters related to the Trusts assigned.

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Stakeholders	
Relationship (within the organisation)	Board of Trustees, CEO, CFOs, Department Heads, Internal Audit, HR & Finance Teams
Relationship (outside the organisation)	Grantees, Vendors & Auditors
Skills & Competencies:	
<ul style="list-style-type: none">• In-depth knowledge of trust accounting, investment management, and financial regulations.• Advanced proficiency in financial software (e.g., SAP, Oracle, QuickBooks) and MS Excel.• Strong communication and interpersonal skills with the ability to engage and influence senior stakeholders.• High attention to detail, organisational, and problem-solving skills.• Ability to think strategically and provide actionable financial advice.• Strong grasp of budgeting, forecasting, and financial reporting.• In-depth knowledge of legal and regulatory frameworks applicable to the Trusts.• Ability to identify compliance gaps and recommend corrective actions.	
Essential Qualification & Experience:	
<ul style="list-style-type: none">• A bachelor's degree in accounting, Finance, or a related field (essential).• A master's degree or professional qualifications (MBA, ACA, or equivalent) would be a distinct advantage.• Proven experience in financial reporting, forecasting, budgeting, and strategic financial planning.• Strong experience in managing audits and compliance with regulatory requirements.• Minimum 10 years of experience, preferably from a Charitable Foundation.	