



RC Archdiocese of Southwark

Finance Director

Candidate Brief

Contact for enquiries

Simon Lloyd,

Director, NFP Consulting

M 07961 988 523

E simon.lloyd@nfpconsulting.co.uk

Welcome

Thank you for your interest in the role of Finance Director.

This is a crucial appointment for the Diocese at this critical time as we seek to deliver on our commitments to the parishes, the communities, the families and the individuals we serve.

The Diocese is not immune from the economic challenges of modern times and particularly so as we respond to the impact of the global COVID-19 pandemic. This demands of us that we look afresh at how we do things and that we make sure that what we do represents the very best use of the resources that we have available.

Our ultimate purpose is the Proclamation of the Gospel in today's world and the messages of hope that it brings. The proper and efficient management of our finances, assets and resources makes possible and underpins our spiritual work.

Our structure, our asset base and our financial systems are incredibly complex, and they require us to take a careful and an astute approach to their stewardship.

Archbishop John Wilson, the trustees and I are seeking someone who not only identifies the options, but also the solutions to what needs to be done.

I hope that you will want to join us in our endeavours and apply your efforts to the worthwhile and vital work that we are engaged in.

I look forward to hearing from you.



**Paul McCallum,
Chief Operating Officer**

Introduction

The Roman Catholic Church is the largest organisation in the world, with 1.3 billion members. In every country, like counties, it is divided into Dioceses. Each Diocese is overseen by a Bishop in communion with the Bishop of Rome, the Pope. The Church and its Dioceses are governed internally by its canon law. As such, each Diocese must equally comply with canon law as well as the civil legislation of the nation in which it operates. Therefore, in the UK, the Church works within canon law and within all current laws of the land, including those relating to crime, employment, and charities. The day to day operation of a Diocese is one thing, but there will be times when complex interactions arise between the demands of canon law and the demands of civil law and how best to meet them.

In England & Wales there are 22 Dioceses. Each Diocese is an autonomous unit, and all have a separate legal identity. Each Diocese under its Bishop is responsible for the management of its own Diocesan affairs. However, there is also a Bishops' Conference for England and Wales. At times, this makes policy decisions for the whole Church throughout England and Wales. There are also annual meetings of the Senior Executives of the various Dioceses to enable collaboration on policies and responses to particular circumstances, such as changes in Charity or Employment Law.

The Roman Catholic Archdiocese of Southwark covers the geographical area of the whole of London south of the Thames, all of Kent and the eastern parts of Surrey. It is one of the largest dioceses in the UK.

The Diocese is divided into 174 parishes. Each Parish is a 'juridical person,' that means each parish is established and operates under the Church's Code of Canon Law which bestows on them individual canonical status. However, the Diocese also has extensive 'Diocesan Operating Procedures' which have the force of canon law and which govern areas of parish life, activity and operation.

As the only body with legal status, the Archdiocese is responsible for ensuring that all parishes (and other associated bodies) comply with UK law.

The Roman Catholic Archdiocese of Southwark is a Charitable Incorporated Organisation (No. 1173050) and is run by a Board of Trustees, who are responsible for determining the strategic direction of the Archdiocese.

Context for the appointment

An exciting opportunity has arisen for an outstanding, experienced finance professional who is values-driven and an inspirational leader to contribute at a senior level in the life of the Archdiocese.

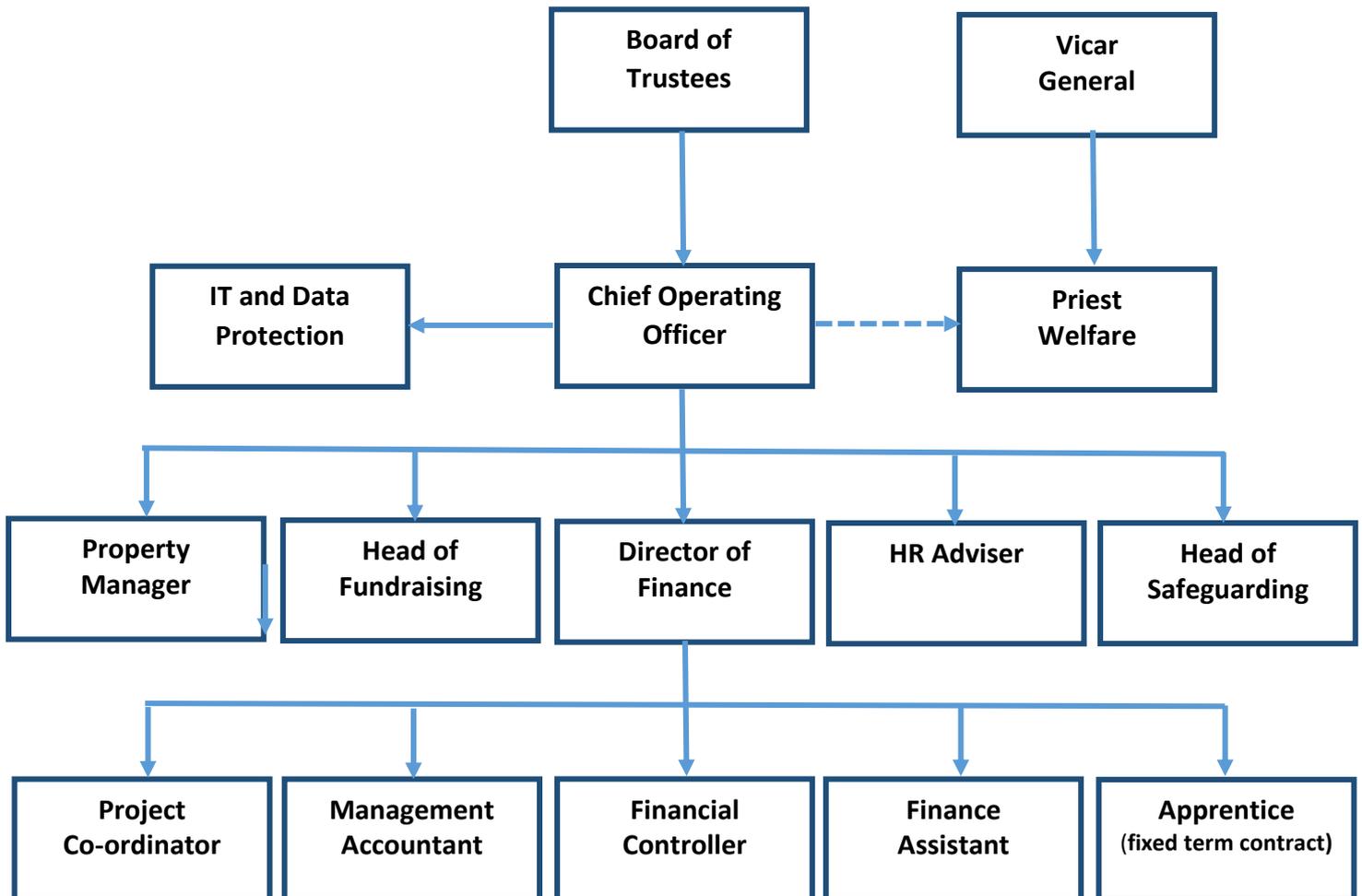
We are looking for someone who can bring intellect and emotional intelligence to leading in a complex environment. You will have a successful track record in financial leadership at a senior board level and have the personal touch to innovate and drive sustainable change. You will be an exceptional communicator who can quickly develop strong relationships internally and externally with a wide range of external stakeholders.

This wide-ranging role will support the Archbishop, the Chief Operating Officer, Clergy and Trustees of the Roman Catholic Archdiocese of Southwark in all aspects of the Charity including development of a financial strategy with supporting forecasting, investment management, capital expenditure, financial aspects of property management, the identification of opportunities for income generation and making best use of the assets of the Charitable trust. You will ensure compliance with regulatory and accounting practices.

CCAB qualified, you will have experience of operating at board level in a complex organisation with a significant interest in property, ideally also with experience of working in the charitable sector. Your ability to contribute to the development of a small director level team will be critical, as will your leadership and team-building skills. You need to demonstrate that, working with clergy and others, you can influence and shape our strategies and plans. You must be able to balance the provision of strategic financial advice to the Trust Board with a willingness to be hands on and directly lead on operational matters and you will be expected to role model the Trust values and behaviours.

Empathy with the religious nature of the organisation is essential and a working knowledge of the Catholic Church would be highly desirable.

Organisational Chart



Job Description

Job title:	Finance Director
Salary:	£70,000
Contract:	Initial contract term of 2 years, full-time
Hours:	35 Hours per week Full time. It is expected that the post holder will work flexibly to meet the demands of the role.
Location:	59 Westminster Bridge Road, London, SE1 7JE
Accountable to:	The Chief Operating Officer
Responsible for:	Finance Team
Internal contacts:	Directors in functional departments. Moderator of the Curia, Vicar General and Episcopal Vicars, Secretary to the Trustees.
External contacts:	Finance leads across the Catholic Church of England and Wales, regulators, legal counsel, auditors, accountants, insurers, and investors as well as suppliers, contractors, and civil partners.

Job Purpose:

Overall executive responsibility for the financial management, control, and financial strategy of the organisation, providing leadership and direction to the finance functions of the Archdiocese. Lead the development and implementation of a Financial Plan. To maximise the value of our resources including property, working alongside the Head of Property.

The postholder will work closely with the COO and Trustees to promote effective operational planning and management. Other key relationships include auditors and other external advisors, all budget holders, parish priests, operational managers and all other staff.

Strategy, Innovation and Leadership

- Providing strategic leadership to the role, modelling its Catholic vision and values whilst inspiring and empowering others to share in achieving them.
- To be the principal financial advisor to the Trustees, Chief Operating Officer and the Archbishop ensuring clear understanding of financial risks and opportunities and leading the dynamic and flexible use of financial and other resources (such as property) to support the delivery of our charitable objectives
- To lead the development and implementation of a medium-term and long-term financial strategy.
- To work with local parishes to optimise the value of our resources

- To work with the COO and Senior Clergy to ensure the financial strategy is aligned with the Archbishop's vision and strategy and is owned and managed at budget holder levels within the organisation
- To take lead responsibility for the development and implementation of the Trust's financial plan (capital and revenue resources) ensuring fit with the Archbishop's Vision and objectives and ensuring a clear focus on the longer-term financial position of the Trust.
- To support the Chief Operating Officer in the annual business planning cycle, engaging, and supporting directors and other leaders to develop costed plans
- To work with the Chief Operating Officer to develop and implement risk management plans that are robust, and leaders are held to account for performance against these plans.
- To ensure that the Trust procures goods and services in the most cost efficient and effective way, delivering increasing value for money year on year
- Provide effective, respected contributions to Board level discussions, supporting the Board to effectively discharge its strategic and corporate leadership responsibilities
- Provide effective leadership to the management and further development of all the services within the Finance team.
- Work with auditors to maximise their contribution to the ongoing development of the Trust
- Lead the development of staff within the finance team to equip, enable and encourage them to develop greater service orientation, responding to the needs of the organisation

Sustained High Performance and Standards

- Ensure high quality, broad-based and timely management information (financial and non-financial as appropriate) is available to all key decision makers and leaders in the organisation to inform decision making and ensure continued improvement in performance against key targets
- Take a lead role in the production of high quality and timely external reporting, including the annual accounts
- Define, implement, monitor and effectively manage the policies, systems, structures and processes that support financial control including effective forecasting
- Work with colleagues as appropriate to ensure that business models and business cases presented are of a consistent, high quality and enable appropriate informed decisions to be made about future investment opportunities in a timely way
- Work with colleagues to ensure a robust framework is in place to identify, track and maximise benefits realisation from all major investments, and for major projects, to oversee effective programme management
- Ensuring that the capacity of the organisation is consistent with a requirement to deliver our charitable objectives and related services in an efficient and effective manner.
- Promoting an attitude and a culture which values innovation and creativity.
- Ensuring the implementation of rigorous performance management systems designed to monitor and review the overall effectiveness of service provision and promoting continuous improvement across all areas.
- Ensure all legal and regulatory documents are filed and monitor compliance with laws and regulations.
- Other duties and responsibilities as agreed with the Chief Operating Officer

Commercial Development

- Working with the Chief Operating Officer and Head of Property, to lead negotiations with commercial partners and to develop services in keeping with our charitable objectives and emerging strategy
- To ensure new business opportunities are effectively identified and evaluated.
- To provide the Board with advice on achieving “best value” in any contractual arrangements
- To take responsibility for the effective management of cash flow relating to creditor payments, payroll, and investments.
- To ensure that effective debt recovery and write off procedures are in place.
- To lead on developing effective capital structures, including the use of external sources of funding as appropriate

Robust and Effective Governance and Assurance

- Ensuring that the Archdiocese of Southwark’s financial viability is secure, firmly based on accurate analysis and reporting, and is able to meet needs of the Trustees and Charity Commission regulation.
- Ensuring an effective culture of managing risk and taking opportunities exists at both operational and strategic levels across the Diocese
- Ensuring appropriate systems, frameworks and training and development is in place to support effective service provision and governance

Personal Flexibility and Resilience

- The needs and requirements of the role of Director of Finance are expected to change and evolve over time. This job description provides an outline of current priorities. The post-holder will be required to undertake other duties and responsibilities considered appropriate to the role.

Person specification

Criteria	Essential/ Desirable	Assessment
Knowledge, Training and Experience		
Qualified Accountant CCAB Qualified Educated to Master's degree level or equivalent	Essential	A/C
Demonstrable experience of working at Board level, financial lead role including planning and implementation of business cases and development	Essential	A/I
Track record of significant achievement in organisational development	Essential	A/I
Proven project management skills, with evidence of delivering large scale projects	Desirable	A/I
Demonstrable experience of leading and effectively managing change in complex environments	Essential	A/I
Experience in managing challenging financial situations including turnaround/financial special measures	Essential	A/I
Detailed knowledge and understanding of current financial issues impacting the Charitable sector	Essential	A/I
Good understanding of regulatory regime and requirements	Desirable	A/I
Well developed analytical skills and use of information technology	Desirable	A/I
Working knowledge of the Catholic Church	Desirable	A/I
Communication Skills		
Excellent presentation and interpersonal skills and the confidence to deal with people at every level	Essential	A/I
Ability to work effectively as part of a team	Essential	A/I
Problem solving skills	Essential	A/I
Equality and Diversity		
Understanding of and commitment to equality of opportunity and good working relationships	Essential	A/I

Autonomy		
Able to work on own initiative, organising and prioritising own workload and that of subordinates to set deadlines	Essential	A/I
Other		
An ability to maintain high degree of confidentiality and trust	Essential	A/I
Commitment to the Archbishop's vision and mission for the Archdiocese of Southwark	Essential	A/I
Empathy with the religious nature of the organisation	Essential	A/I
Positive and flexible approach to work	Essential	A/I

- A** – **Application Form**
- I** – **Interview**
- T** – **Test**
- C** – **Certificate**

How to apply

Application is by way CV and a Supporting Statement.

In the supporting evidence of your application form, you must demonstrate your experiences by giving specific examples for the criteria within the person specification.

For an informal discussion about the role, please contact our recruitment partner.

Simon Lloyd,
 Director, NFP Consulting
 M 07961 988 523
 E simon.lloyd@nfpconsulting.co.uk

Closing date: Monday 19th October

Selection process and timescales

Stage 1 – week beginning 19th/26th October

First round of screening interviews conducted by NFP Consulting.

Candidates taken forward will be required to complete an online occupational personality questionnaire, which is completed online.

Stage 2 – Tuesday 3rd November

Formal panel interviews with representatives of the Archdiocese. The format will include a presentation task.

Accessibility

Please let us know if you have any special requirements which we might need to consider in relation to the selection process, e.g. attending interview, completing the online exercise. Any requests will not be taken into account in the selection process.