

## Job Description

<b>Title:</b>	<b>Head of Finance</b>
<b>Department:</b>	<b>Finance</b>
<b>Reports to:</b>	<b>Chief Operating Officer (COO)</b>

### **Main Purpose and scope of role:**

The Head of Finance, together with the finance team, is responsible for the financial and management accounting functions of the Archdiocese. The post holder will be responsible for the production of the Annual Report and Accounts, regular reporting of financial performance to the Board of Trustees as well as ensuring that the appropriate financial systems and records are maintained. Annual income and expenditure for the year, including Parish and Curia activities, approximates to £9 million, with £2 million relating to Curia Activities. The post holder will report to the COO and will be responsible for providing financial management information to the Trustees, and work with the Finance Committee to ensure that the Archdiocese meets its charitable objectives. The post holder will also, along with the COO, will be responsible for Data Protection compliance.

### **Key relationships:**

- The Archbishop and his senior team, particularly the Chief Operating Officer.
- The Board of Trustees and the members of the Finance Committee
- The Archdiocesan parish priests - to ensure that appropriate financial procedures are in place at parish level and to provide advice and support as required.
- External agencies including: regulatory bodies such as OCSR and HMRC, external auditors, Investment Fund managers

### **Key accountabilities:**

#### **Financial Reporting**

- Production of Annual Report and Accounts.
- Preparation of quarterly reports on financial performance for consideration by the Board of Trustees.
- With the COO, preparation of an annual budget, and longer term financial strategy, for approval by the Board of Trustees.

## **Financial Systems**

- Ensuring that the appropriate financial systems and records are maintained, with an appropriate system of internal controls.
- Ensuring that IT systems are effective and efficient, with the assistance of a third-party IT support organisation.
- Overseeing an external payroll function for Parishes and internal for the Curia, to ensure compliance with pension and HMRC requirements.
- Providing advice and guidance to Parishes on relevant financial issues, including the development of financial systems.
- Ensuring that appropriate banking services are in place to meet Parishes and Curia needs.
- Monitor Archdiocesan investment activities, including investment performance and compliance with investment objective and policies.

## **Financial planning and budgeting**

- Preparation of an annual Curia budget, and longer term financial strategy to ensure that planned expenditure is within available resources.
- Working with relevant budget holders, monitoring financial performance and reporting at regular intervals to the Finance Committee and Board of Trustees,
- Providing financial guidance and support on projects, including property asset management, to ensure effective use of resources.

## **Line Management of the Finance Team**

- To lead and manage the Finance Team, ensuring high quality work, meeting of deadlines, priority tasks identified and delivered.
- To set objectives, carry out appraisals and identify training and development needs.

## **Data Protection**

- Working with the Chief Operating Officer, to lead the Archdiocesan work on Data Protection, to ensure compliance with relevant legislation.

## **General**

- Providing advice and guidance to the Trustees, Chief Operating Officer and Finance Committee to facilitate decision making.
- Providing advice and guidance on financial procedures to support colleagues within the Curia and at the parish level.
- Ensure appropriate risk management techniques and financial controls are embedded within Archdiocese practices and procedures.
- Any other duties as reasonably requested by the Chief Operating Officer commensurate with the capabilities and duties associated with the post.

## **Qualifications/Knowledge**

- Qualified Accountant
- Knowledge of portfolio management desirable
- Experience of working with Sage accounting systems/software preferable

- A good knowledge of Scottish Charity legislation
- Up to date and practical knowledge of Data Protection

### **Experience**

- Minimum of 5+ years senior accountancy experience in a complex organisation.
- Experience of working in a charitable organisation at professional level is preferable.
- Relevant staff management and team leadership experience.

### **Skills and Abilities**

- Excellent IT skills
- Able to build strong personal relationships with a wide range of stakeholders including Priests in Parishes, Trustees, the Finance Committee, Auditors and various external organisations as appropriate.
- Strategic leadership – able to identify issues, formulate solutions and deliver outcomes in a team-based environment.

### **Other requirements**

- Able and willing to travel and occasionally work unsocial hours as required.