

**Director of Finance &
Corporate Services**

Recruitment Pack 2024

Dear Applicant

Thank you for your interest in the post of Director of Finance & Corporate Services.

We currently have a Leadership Team of four, focused on Operational Leadership and managing stakeholder relationships.

The Board of Trustees alongside the Leadership Team are working on agreeing the future focus of the organisation.

In recent years we have completed a review to strengthen our leadership structure. This has added significant capacity to allow us to improve both our internal systems as well as our outward focused relationships across Southern England and at national level.

The Director of Finance and Corporate Services is a key member of the Leadership Team with joint corporate responsibility for the leadership and management of Help & Care.

The organisation is flexible and agile, responding to the rapid and ongoing changes in the world in which we operate. We are currently progressing through a Transformation Programme to reflect growth and the potential future growth as well as the potential challenges the organisation faces as we strive for operational excellence and becoming the employer of choice.

Therefore, we are seeking an individual with strong commercial insight to contribute to creative thinking to help develop creative responses, to drive growth and impact for our social enterprise.

Our values are at the heart of everything we do, and we continue to champion social justice and innovation. Working in partnership with others, we continue to make a difference with meaningful changes in people's lives and communities.

We seek a leader who embodies these values and brings enthusiasm, and a positive outlook to tackle the challenges we face.

As the Director of Finance and Corporate Services, you will play a pivotal role in driving strategic finance initiatives and ensuring the efficiency of our operations. You will provide business financial expertise and oversight of our data and digital functions, steering a small finance team of two towards achieving our ambitious goals. Your expertise will be crucial in maintaining our financial health and supporting the charity's continued growth.

We look forward to receiving your application.



Mark Sharman
Chief Executive Officer


About Help & Care


Help & Care is an established charity and social enterprise. We are a values-led organisation with over 39 years' experience of helping people and communities live the lives they choose. We work across Southern England with services currently operating in Dorset, Isle of Wight, West Sussex, East Berkshire, Bracknell Forest, Windsor and Maidenhead. You can find a potted history of our development [here](#).


We have a small administrative office in a shared business space in Christchurch.


Most of our employees work from home, with some working from local bases.

Help & Care's values are:

 **Social justice** sits at the heart of all our work, and we will use it to challenge, advocate and influence policies and practices

 **Innovative approaches** to our work means we break new ground, delivering enterprising solutions, always with social, financial, and environmental impact at the forefront

 **Personal** – we believe that every individual deserves to be treated with respect and compassion with their own personal needs at the centre and supported with tenacity and creativity

 Working in **collaboration** with other organisations, including the public, private and voluntary sectors, enhances our work at all levels

Our Strategic Objectives are:

- Help & Care is a sustainable and effective organisation fit for future needs
- Help & Care is as strategic influencer, collaborator, and innovator changing everyday practice
- Help & Care delivers more services and makes a difference in more people's lives and making more communities better places

We have seen numerous developments in the past year and have great ambitions for the future.

A summary of our achievements over the past year and key actions contained in the 2024 – 2026 business plan that can be found further into this document.

Why we are recruiting

The organisation, like many others, has had to flex and be agile to respond to the rapid and ongoing changes in the world in which we have been operating.

The organisation has seen significant growth over the past two years and needs a fresh approach to how we structure and lead the organisation.

As a growing charity based with over 150 dedicated staff, we are seeking a Director of Finance and Corporate Services to lead our finance team.

This pivotal role requires a strategic finance expert with exceptional commercial insight to drive efficiency and enhance financial performance.

The Director of Finance & Corporate Services will have a responsibility to actively develop and promote a positive organisational culture based on the values of the organisation, as well as overall responsibility for the delivery of financial and corporate services.

The successful candidate will oversee data and digital initiatives, ensuring robust financial management and operational excellence.

If you are passionate about making a difference and possess the vision to elevate our financial and corporate services, we invite you to join us and our Leadership Team in transforming lives through compassionate care and innovative solutions.

The organisational structure for the Leadership Team is found below.

Organisational Chart

Chief
Executive

Director of
People &
Organisational
Development

- Learning & Development
- Human Resources
- Internal/External Communications
- Organisational Development

Director of
Services

- Dorset Self-Management Service (DSMS)
- Dementia Service
- Charitable Services
- Access Wellbeing Service

Director of
Finance and
Corporate
Services

- Finance
- IT Infrastructure
- Data and Digital oversight
- Compliance

Director of
Partnerships,
Research and
Influence

- Healthwatch
- Wessex Voices
- Involving People
- Partnership engagement
- Service Development

Our headline achievements during 2023/2024

- Maintained contract value and increased contract diversity
- Enhanced offer and opportunities resulting in additional activities
- Improved governance arrangements
- Improved digital capacity and developments to enhance communications, connectivity, and reporting across the organisation
- Improved Internal Communications, engagement, and connectivity
- Established Organisational Development Group with 3-year plan underway
- Agreed Finance / investment plans
- Review of Marketing and Communications with action plan
- Improved data quality and insight and reporting

The focus in 2024/25 is on improving capacity with the following in mind:

- Become the trusted employer of choice
- Operational excellence secured and embedded across all services
- 30% growth by 2026
- Increasing the organisational profile
- Improving connectivity across a diverse workforce
- Improving employee skills for multiple and varied working environments
- Improving insight across the organisation and horizon scanning to inform business development opportunities
- Embedding customer feedback processes to highlight service quality and areas for improvement
- Retaining contracts and improving evaluation of new business opportunities

The 2023-2026 Business Plan has workstreams set under each strategic objective:

1. Help & Care is a sustainable and effective organisation fit for the future
 - a. Governance
 - b. Digital
 - c. Finance
 - d. Marketing and Communications.
 - e. Organisational Development and Culture
2. Help & Care is as strategic influencer, collaborator, and innovator
 - a. Insight and Impact
 - b. Ideas and Innovation
 - c. Influencing
3. Help & Care delivers more services and makes a difference in more people's lives
 - a. Business development
 - b. Contracts delivery
 - c. Customer experience

Summary headline actions for 2024/2025

- Reviewing infrastructure and capacity
- Assuring Quality and Safety
- Building digital capacity & infrastructures to support multiple working practices
- Enhancing connectivity & digital skills across organisation
- Developing programmes to support culture, behaviours and values and develop a workforce fit for the future
- Supporting and promoting employee wellbeing
- Assuring financial security
- Improving data insight and generating innovative collaborations
- Understanding and articulating our impact
- Developing a cross organisational customer engagement approach
- Reviewing approach to business development opportunities

JOB DESCRIPTION

Job title:	Director of Finance & Corporate Services
Reports to:	Chief Executive
Accountable to:	Chief Executive
Location:	Dorset
Contract:	Permanent
Salary:	Grade F Point 58 £64,621 per annum for working full time 37 hours per week Pro rata £39,296 per annum for 22.5 hours per week Pro rata £52,395 per annum for 30 hours per week
Hours:	Part Time 22.5 hours per week or 30 hours per week

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Innovative approaches to our work means we break new ground, delivering enterprising solutions, always with social, financial, and environmental impact at the forefront



Personal – we believe that every individual deserves to be treated with respect and compassion with their own personal needs at the centre and supported with tenacity and creativity



Working in **collaboration** with other organisations, including the public, private and voluntary sectors, enhances our work at all levels

Context

Help & Care has a vision of People and Communities living the lives they choose. Everything we do is because someone, somewhere, wanted something different and better out of life and we are determined to support them to make it happen.

The Director of Finance and Corporate Services is a key role within Help & Care, providing strategic solutions and operational leadership.

This role presents an exciting opportunity to drive, develop and implement the Financial Strategy and support the effective organisational delivery, working towards an inclusive culture of authentic leadership.

Summary of Key Accountabilities

Corporate Accountabilities

1. To work with and support the Chief Executive as a key member of the Leadership Team to drive the strategic direction of the organisation.
2. To make a positive and creative contribution to the development of corporate strategy and policy formulation at Board and Leadership Team level.
3. To actively develop and promote a positive organisational culture based on the values of the organisation: Social justice, Innovative, Personal and Collaborative.

Responsibilities include:

1. To actively develop and promote a positive organisational culture based on the values of the organisation.
2. Overall responsibility for the delivery of financial and corporate services, currently including:
 - Finance Management
 - Financial Strategy Investment
 - Investment Strategy
 - Digital Strategy IT
 - Digital Infrastructure and Security
 - Property and equipment

Specific Accountabilities of the Role

1. To provide clear, determined leadership to ensure delivery of Help & Care's Business Plan, Budget and wider corporate objectives.
2. Provide leadership and coaching to help design and implement a vision that will inspire and motivate high performance across the business.
3. Financial modelling for the development of Help & Care's business.
4. To be responsible for the annual setting, monitoring and achievement of the finance and corporate services budgets and oversee, via delegated budget holders, budgets for each core areas with the functions. To lead staff in best practice in financial management and to ensure that financial systems are adhered to at all times.
5. To be responsible for developing the financial acumen of responsible budget holders, through constructive dialogue and discussion with Leadership Team and Managers.
6. To ensure that Help and Care's financial and corporate services are performance managed in a systematic and enabling way with the culture and ethos of the organisation, ensuring that we can effectively measure performance and impact.
7. To report performance and associated issues accurately and in a timely manner to the Board and Leadership team, ensuring that they are provided with the appropriate information with which to carry out their governance responsibilities.
8. To develop, design and implement new strategic initiatives which will contribute to the Help and Care vision.
9. Delegate responsibility and provide constructive feedback and coaching to individuals in roles where there is a high degree of discretion in decision making.
10. To provide strong, empowering leadership for the finance and corporate services teams, effectively line managing all direct reports, supporting and developing them to achieve their agreed objectives, modelling appropriate leadership styles and coaching managers as appropriate to achieve the required outcomes.
11. Develop and maintain strong relationships with external organisations to ensure they deliver effective services and in line with contractual obligations. These include external auditors and those who provide outsourced HR, H&S and IT services.
12. To provide support to Healthwatch Community Interest Company (CIC) Boards in preparation of account, audit and meeting statutory obligations.
13. Recognise where change is needed, to embrace and create an enthusiasm for change and to work effectively with others to develop creative, innovative, and customer-focused solutions.

14. Provide business change and organisation design expertise to lead, support and advise on change activities on projects and programmes as required.

15. Provision of financial information:

- To ensure and oversee the preparation of:
 - End of year accounts.
 - Management accounts and financial reporting to the Board of Trustees and Leadership Team.
 - Budgets for all areas of the organisation.
 - Statutory accounting reporting including VAT returns, ensuring tax and legal requirements are fulfilled:
 - ii. The Annual Report.
 - iii. Reporting to funders as and when required.
 - iv. Insurance schedules in order to fulfill operational, legal and contractual requirements.

Person Specification

Qualifications

Fully Qualified Accountant (CCAB).

Knowledge

Essential:

Full accounting knowledge on preparation of accounts, budgets, monitoring of income and expenditure and VAT accounting.

Sound knowledge of IT systems management and development.

Understanding of principles of fundraising and income generation.

Understanding of governance.

Understanding of requirements of GDPR and Data Protection.

Desirable:

Charity Commission SORP requirements. Charity

VAT accounting.

Familiarity of Charity Law.

Understanding of public sector contract requirements.

Experience

Extensive experience of practical accounting in commercial or charity sector.

Proven ability of leading and developing a high performing team.

Previous experience of financial forecasting and risk analysis.

Previous experience of monitoring and analysing business plans and accounts.

Proven ability to effectively monitor financial implications of contracts.

Previous experience of effectively utilising accounting database systems.

Previous experience of successful tendering.

Person Specification

Skills

Excellent IT skills, including use of databases and Excel.

Ability to present complex financial information to a variety of different audiences, ensuring information is clear and understood, including financial reports, budgets and business plans.

Excellent communication, organisation and administrative skills.

Excellent accounting skills, including cash flow management skills.

Leadership & Personal Qualities

Leading the organisation:

Demonstrable ability to translate strategic perspective to employees at all levels within the organisation and external stakeholders

Proven ability to effectively analyse complex issues in order to identify core issues.

Proven ability to promptly assess situations, identify risks and make appropriate decisions.

Demonstrable ability to effectively manage change and support those who are resistance to change to help them overcome their resistance.

Demonstrable willingness to embrace new technologies and business development.

Leading others:

Demonstrable ability to motivate and develop others.

Ability to act decisively and with fairness at all times.

Work collaboratively, involving others and enabling them to have voice that is heard.

Ability to build effective working relationships with others, both internal and external to the organisation.

Demonstrate a genuine interest in others and show that they are valued for the work they do.

Person Specification

Leading yourself:

Demonstrate ability to take the initiative, capitalising on opportunities.

Ability to remain calm and composed in challenging situations.

Demonstrate self-awareness.

Lead by example by having a good work – life balance.

Ability to use effective management techniques, including mentoring, coaching and providing effective feedback.

Conditions:

Carry out other such duties as may be required by the Chief Executive, Leadership Team and Trustee Management Board which are consistent with the duties and responsibilities of the post.

There will be an assessment of competence to practice during induction and 6-month probation period.

The nature of the job will require travel in the postholder's own car for which expenses will be paid as set by the Trustee Management Board.

The working week will be either 22.5 or 30 hours per week during standard office hours.

The nature of the work will also necessitate occasional evening/weekend work to attend meetings etc. for which time off in lieu will be granted.

The other conditions of service and other current procedural agreements will be enclosed with the post-holders Contract of Employment.

The post holder will be required to have broadband to be able to work from home.

Benefits:

Annual Leave: 30 days per annum plus bank holidays. (Pro-rata for part -time employees)

Birthday Leave: All Staff receive their birthday off work as paid leave (1 day)

Buy Extra Annual Leave: Staff can purchase up to one week's extra annual leave in addition to their annual entitlement

Flexible working: A range of flexible working arrangements

Employee Health & Wellbeing Service: Offering healthcare treatments, money towards the cost of dental treatment, eye tests and prescriptions, 24-hour access to GP helpline, discounted gym memberships, 24-hour counselling service (either via telephone or face-to-face) and much more

Pension Scheme: All eligible staff will be automatically enrolled into the pension scheme, with a 3% contribution from Help & Care and 5% contribution from the employee.

'Cycle to Work' Scheme

Training: Access to training/personal development

Hybrid working: Where you will be working from home for the majority of time

Making your application

Hilary Channing Associates have been engaged to manage the recruitment process and Hilary Channing will be your main contact throughout the process.

We ask you to please take a moment to read these guidance notes so that you are clear on our requirements.

Application Guidelines

To make your application we will need:

Your CV

This will need to be up to date and ideally around a maximum of 3/4 sides of A4. When you're providing information about your past employment, please clearly explain any employment gaps and ensure it is tailored to this role and application. Please check the contact numbers and email you provide are correct and that we have your home address.

Your Supporting Statement

This will be part of the shortlisting process. We ask you to please keep to a maximum of 2 sides of A4. This is your opportunity to make a compelling case of what you will bring to Help & Care as our Director of Finance & Corporate Services and your motivation for applying. We are looking for demonstrable evidence so short examples of relevant achievements are helpful.

Once you have your CV and Supporting Statement ready, you will find a **Declaration Form** which needs to be completed and an **Equality and Diversity Form** which you are invited to complete on the website below these papers.

All forms need to be sent together to hilary@hilarychanningassociates.co.uk and we will acknowledge your application within 24 hours of receipt, so in the event you do not receive this acknowledgement, please let us know so that we can check.

Please note that proof of emailing does not mean proof of receipt and remember to check your junk file for emails. If you can mark our email as a safe one, we can communicate easily.

Please take time to review our Privacy Statement on our website before making your application. This will tell you how we hold and use your information.

If, having read all the information, you would like an informal chat, please email Hilary@hilarychanningassociates.co.uk to schedule a call.

Please also review further information and publications at Help & Care website: <https://helpandcare.org.uk>.

We look forward to receiving your application.

Recruitment process and key dates

Your application will need to be received by 9am on Friday 6 September 2024 and we will be in contact with you the following week by to let you know the outcome.

Shortlisted candidates will be invited to attend an initial interview with Hilary Channing Associates which will be held via Zoom.

Candidates who are shortlisted from these interviews will be invited to undertake online executive profiling (HPI suite) and to attend a final assessment day.

Full details of this day will be available to the shortlisted candidates in advance.

Recruitment Stage	Dates
Closing Date for receipt of applications	9am on 6 September 2024
Shortlisting	w/c 9 September
Initial Interviews (Virtual)	17,18 & 19 September (flexible)
On line executive assessment	w/c 23 September
Final Interviews	w/c 30 September