



# Director of Operations and Finance

Candidate Pack



*the* DIOCESE of  
EAST ANGLIA

The White House, 21 Upgate, Poringland,  
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[www.rcdea.org.uk](http://www.rcdea.org.uk)





Dear Candidate

Thank you for your interest in applying for the post of Director of Operations and Finance.

We see this post as essential to the Mission of our Diocese. We want to support our parishes and schools in their efforts to live lives in the spirit of the Gospel. This is a key role working closely with the Bishop and the Trustees, along with the other Curial officers. We need strong and consistent financial leadership and management skills, but we also need someone who ensures that the right systems are put in place to enable all the varied operations of the Diocese to run smoothly. We need an excellent communicator who can motivate others. The role also includes ensuring that we meet the legal requirements for the Diocese to function, in line with Civil, Charity and Canon law.

The work of the Diocese encompasses all walks of life, young and old, wealthy and poor, healthy or unwell and a rich variety of cultures. Any applicant needs to understand that we work in parishes, schools, prisons, hospitals and with any sections of society who need our help. We must promote the values of our Catholic Faith in all our work, and for this reason, it is essential that we appoint a practicing Catholic who understands how to instill our ethos into every undertaking of the Diocese.

If this role energises your missionary vision, then we would be very pleased to hear from you.

Yours in Christ

+ *Alan Hopes*

Bishop Alan Hopes





# What Can We Offer You?

## GREAT LEADERSHIP AND COMMITMENT



**Bishop Alan Hopes: Bishop of Diocese of Anglia**

This postholder will be accountable to the Bishop and the Trustee Board of the Diocese. Our Trustees come from a variety of backgrounds and they bring a wealth of expertise, skill and dedication to the role.

Our parishes and schools are spread across a wide geographical area: Norfolk, Suffolk, Cambridgeshire and Peterborough. They have very diverse populations which bring great cultural and religious understanding. As a Diocese we are open to innovation and further development.



**Deacon James Hurst: Retired Engineer and General Manager**



**Moira Goldstaub: Lawyer specialising in property and land law**



**Laurretta Pilch: Solicitor**



**Christine Quinn: Retired teacher, Head Teacher and senior civil servant. Currently involved in governance and chaplaincy**



**Marie Roberts: Chartered HR and Management Consultant**



**Mgr Tony Rogers: Parish Priest**



**Professor Edward Acton: Historian, former Vice-Chancellor**



**Canon David Bagstaff: Vicar General of the diocese and parish priest of St Edmunds, Bury St Edmunds, Suffolk**



# GREAT DIOCESE

East Anglia is a great place to live and work. The Catholic Diocese has:

A supportive Bishop and Board of Trustees;  
a small but effective finance team;  
Trusts and schools that desire to work collaboratively;  
Supportive Parishes of varying sizes and demographic makeup.

Across the Diocese there are historic cities, rural beauty and a beautiful coastline. It is an area of the country that enjoys celebrating the arts, culture and heritage. Agriculture is important in the area but so, too, are centers of great scientific and technological innovation. It is truly an area of great diversity!

We have a beautiful Cathedral in Norwich where we enjoy celebrating as a Diocese when we come together as a diocesan family.



The Finance team is small but highly professional. It consists of the Director of Operations and Finance, the Diocesan Accountant, supported by Finance Assistants, a Stewardship and Fundraising officer and a Historic Churches officer. While each member of the team has particular skills and areas of responsibility, they also have the expertise to assist each other in times of pressure, which makes the most effective use of their time. We share an office at Poringland, within the Curial Offices, in pleasant surroundings with ample parking.





# GREAT OPPORTUNITIES

Like all Dioceses we have been hit with rising costs and the uncertainties that the pandemic has brought. However, the Diocese is always open to new ideas and innovation and we have officers and staff who are keen for further development. Without a doubt, we need to make savings but we are reluctant to compromise some of the good work that is happening throughout the Diocese. The Trustees are, therefore, looking for us to work 'smarter', being innovative and creative, across all fields, in our response to challenges. We need to be organised and efficient, whilst at the same time being realistic, honest and responsive to the unforeseen.



As a Diocese we need to be ever outward looking and open to new ideas, developments and fresh ways of working.

If you want to be a Director who innovates, grows and makes a difference, then East Anglia is where you want to be!





# Job Description

## Director of Operations and Finance – Diocese of East Anglia

The Roman Catholic Diocese is very large geographically, but small in the number of parishes and schools. You will be a knowledgeable, enthusiastic communicator with great people skills and a passion for leadership and management.

### Job Purpose

The Director of Operations and Finance is a crucial role responsible for the effective deployment of the Diocese's finances, as well as other resources, in line with the objectives of the Charity and the decisions of the Bishop. This Director will work closely with the Bishop, the Catholic Priests across the Diocese, other staff of the Curia and the Charity's Trustees to ensure the well-ordered stewardship of the Diocese's finances and resources by providing leadership to the finance and general office services. In addition, this postholder is the line manager of the Cathedral Manager of the Cathedral of St John the Baptist Complex.



## Key Duties and Responsibilities

### Financial Strategy, Objectives and Plans

- + Working with the Bishop, senior staff and the Trustees to develop the Diocese's financial strategy that is consistent with the Diocese's and Charity's stated vision and objectives.
- + Provide financial leadership to the Diocese.
- + Advise the Bishop, Episcopal Vicar for Finance and the Trustees to ensure the highest standards of financial governance. This includes:
  - Compliance with statutory and other financial duties and responsibilities
  - Optimising value for money in the use of the Diocese's resources
  - Ensuring that the resources are deployed to best effect to deliver the Diocese's objectives
  - Achieving a balanced budget
- + Work with the Clergy and senior managers to develop and implement plans and policies which will secure the financial stability for the Diocese and appropriate deployment of resources. This will include development of a financial framework which takes account of the need for short, medium and long term financial plans and contingencies.
- + Oversee financial analysis and modelling to ensure that in-year plans and projections for future years are robust.





## Professional Advice and Liaison

- ✦ Professional finance, governance advice and liaison to other Diocesan bodies including: Diocesan Schools Service Commission, Building and Finance Sub-Committees, Clergy Welfare Group.
- ✦ Liaise with and advise the Schools Team on Capital projects and insurance matters.
- ✦ Build good working relationships with other Diocesan Financial Secretaries to enable sharing of good practice and support. Attend the annual meeting of Diocesan Financial Secretaries Network.
- ✦ Provide advice and support to parish priests and their representatives regarding financial and other diocesan procedures.

## Representation and Networking

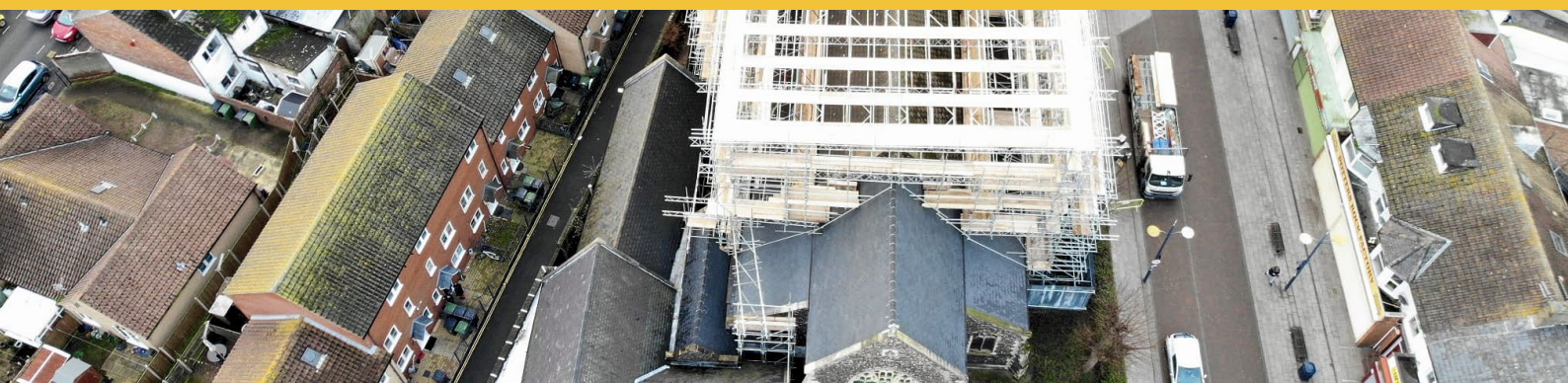
- ✦ Represent the Diocese by providing advice, guidance and support and, where necessary, intervention at occasional visits and meetings in parishes and schools.
- ✦ Represent the Diocese on other bodies such as: Historic Churches Committee
- ✦ Prepare and issue quarterly financial newsletters to parishes
- ✦ Oversee liaison between the Diocese and the United Kingdom Visas and Immigration Service (UKVI) in applying for visas for migrant priests.

## Property

- ✦ Monitor financial planning and expenditure of large parish building projects and recommendations made in the quinquennial survey reports. Oversee the diocesan property portfolio, ensuring that lettings and rental income are appropriate and commensurate with the prevailing market conditions.
- ✦ Provide leadership and direction to parishes regarding premises and related matters.
- ✦ Manage the Diocese's preferred surveyors to ensure:
  - Quinquennial reports and health and safety inspections are undertaken on properties under the ownership of the Diocesan Trustee and that effective plans are created to address any concerns identified.
  - Parish building works are arranged and managed in accordance with diocesan procedures, including processing and referring Parish Project Approval Forms.
  - That sound advice on maintenance of the buildings and management of repairs and refurbishment is provided.
- ✦ Process Parish Spending Approval requests, referring them to the Diocese Building sub-committee where appropriate and authorising where necessary.
- ✦ Monitor insurance arrangements for all properties under the ownership of the Diocesan Trustee.
- ✦ Assist and advise parishes in the implementation of the diocesan policy for redundant churches.
- ✦ Ensure safe custody of the diocesan property title deeds.

## Financial, Risk Governance and Company Secretary Role

- ✦ Ensure preparation, timely distribution and presentation of agenda, reports and all relevant information to the meetings, and ensure accurate minute taking of the:
  - Diocesan Finance Board (DFB) and the Diocesan Building Sub-committee (DBS).
  - Diocesan Finance Subcommittee.
  - Cathedral of St John the Baptist Trust.





- ✦ Professional advisor to the Bishop, the Diocesan Finance Board and its committees regarding governance.
- ✦ Oversee and scrutinise parish accounts, consolidate the parish financial returns and ensure appropriate audits are completed.
- ✦ Keep an overview of wider changes (e.g., global and UK financial trends and charity regulation) that may impact on the Diocese and advise.
- ✦ Maintain and manage the Diocesan financial risk register, report to the DFB and ensure effective management of identified risks and remedial action where necessary.
- ✦ Ensure the Diocese adheres to its legal obligations, including GDPR and Charity Law.
- ✦ Maintain a working knowledge of the Diocesan Trust Deed, Memorandum and Articles of Associates and the requirements of the Charity Commission.
- ✦ Ensure submission of annual returns to the Charity Commission and Companies House.

### Financial Management and Reporting

- ✦ Ensure effective and robust financial planning, accounting and internal control procedures are in place, understood and adhered to.
- ✦ Oversee all financial operations of the Diocese, including budgetary setting and control.
- ✦ Ensure the decisions of the DFB and DBS are implemented, and follow up any issues arising, reporting back on progress to the DFB and DBS as required.
- ✦ Scrutinise, authorise and ensure the appropriate payment of invoices.
- ✦ Working with other senior staff, establish a balanced budget for Diocesan and associated charity operations.
- ✦ Compile and update records regarding parish levy arrangements and ensure appropriate amounts are charged to parish accounts.
- ✦ Review Diocesan interest rates half-yearly, implement agreed rate changes and ensure appropriate amounts are credited or charged to parishes.
- ✦ Oversee Gift Aid procedures.
- ✦ Oversee the arrangements for parishes requesting loans and bonds from the Diocese.



### St John the Baptist Cathedral Company Secretary

- ✦ Oversight of all business and financial operations of the Cathedral Complex.
- ✦ Line management for the Cathedral Trust's manager, in collaboration with the Cathedral Dean (see line management below).
- ✦ Advising the Cathedral Trustees on the strategic and business planning and operation of the Cathedral complex, including remedial planning when necessary.
- ✦ Effective reporting of the financial position, variation from budget and progress against plans.
- ✦ Ensure the meetings of the Cathedral Trustees are provided necessary administrative support.





## Contract Management (excluding Education Department contractors)

- + Manage and oversee all Diocesan contracts with external service providers, such as auditors, surveyors, legal representation and investment advisors.
- + Responsible for regular review and appropriate tendering processes for external service providers in accordance with Diocesan policies.
- + Liaise with Diocesan service providers including accountants, auditors, solicitors, bankers, property surveyors, insurers, investment manager, IT consultants and others.

## Leading Financial and People Skills Development

- + Lead on Finance Training and Development, to improve financial skills throughout the diocese, including:
  - Ensuring there is appropriate financial capability and understanding for those occupying parish treasurer roles and Parish Priests.
  - Ensuring the Diocese team receive sufficient professional development and support so that they can undertake their roles effectively.

## Staff and Office Management

- + Maintain and adjust staffing (and volunteer) levels to meet the workload and ensure appropriate succession planning.
- + Line manage staff and co-ordinate the work of the finance team to enable the Charity to deliver all of its statutory and financial duties. This will include: recruitment, appointment of volunteers, deployment, objective setting, appraisals, managing sickness absence and managing performance.
- + Draw up contracts of employment.
- + Ensure the Parish Employment Guide and Employee Handbook are kept up to date.
- + Monitor efficiency of offices procedures, including the use of IT.
- + Undertake other duties as required by the Bishop and Trustees from time to time.

## Confidentiality

During your employment, you will gain knowledge of highly sensitive confidential matters, which may include personal and/or business-related issues. Such information must be considered strictly confidential and must not be discussed or disclosed. Failure to observe this confidentiality could lead to disciplinary action being taken against you.





# Director of Operations and Finance - Person Specification

## Essential

- Good knowledge of the principles of sound corporate governance.
- Demonstrable leadership skills and experience
- Qualified at degree level or equivalent.
- A committed practising Catholic.
- Have undertaken appropriate continuous development
- Experience of working at Board level.
- Proven track record of addressing overspending budgets and ensuring sustainable financial positions.
- In depth understanding of Charities and the relevant legislation.
- Significant experience working with proven success at a financial or senior leadership role.
- Experience of working with professionals in other disciplines (e.g. property, quantity surveying, architecture, project management, law ...).
- Demonstrable ability to manage several initiatives at once and deliver within tight timescales.
- Ability to devise, implement and supervise procedures and systems to maintain financial control.
- Ability to analyse and interpret complex financial data.
- Excellent communication skills, including written correspondence and reports.
- Strategic thinker.
- Exceptional influencing skills and networking, including being able to use tact and diplomacy.
- Ability to make presentations to groups of people demonstrating the ability to explain complex issues in ways appropriate for the audience to enable understanding.
- Able to work as an effective team member.
- Effective systems leadership.
- Have an innovative and enthusiastic approach to work.
- Entirely trustworthy and able to maintain confidentiality.
- Ability to travel to other sites within the Diocese.
- Computer literate.

## Desirable

- An understanding of the structures and arrangements of the Catholic Church.
- Further specialist training or equivalent experience.
- Post graduate qualification in an additional field relevant to the role (such as management).
- An awareness of the Code of Canon Law, as relevant to a Diocese its parishes and this role.
- Being up to date with Computer systems.





# Job Details – Director of Operations and Finance

Location: Poringland, Norwich, plus travel across the Diocese

Accountable to: Bishop of East Anglia

Line Manager: Episcopal Vicar for Finance plus another Trustee

Responsible for: Finance office staff, Cathedral Manager (Cathedral Complex)

Salary Range: £73,000 – £80,000

Hours: Full-time, Some evening and weekend hours.

Holidays: 28 days per annum plus bank holidays.

Key Relationship: The Bishop, Episcopal Vicar for Finance, Clergy of East Anglia, Parish Treasurers, Director of Education and other Diocesan staff, Diocesan Schools Commission, The East Anglia Roman Catholic Diocese Trustees, staff of the Diocese's Curia, Cathedral of St John the Baptist Trustees, Historic Churches Committee, The Diocese's auditor's, legal representatives, property surveyors and investment managers.

## How to Apply

If you wish to discuss this exciting post, or need any further information, then please arrange an informal chat with a Trustee. To arrange this, please call Jane Delph on 01508 495509 or email her at [ssc@rcdea.org.uk](mailto:ssc@rcdea.org.uk). Candidate pack and application form can be downloaded at:

[www.rcdea.org.uk/vacancies](http://www.rcdea.org.uk/vacancies)

All completed applications to be returned to Jane Delph at the above email address.

Closing Date: Noon 29th April 2022

Interviews: Wednesday 11th May 2022



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