



# Director of Finance

## APPLICANT BRIEFING PACK

March 2025





## ABOUT THE CATHOLIC DIOCESE OF PORTSMOUTH

### Our Diocese

We are the Diocese of Portsmouth, governed by the Bishop of Portsmouth, Bishop Philip Egan. We belong to the One, Holy, Catholic Church, which is led by the Bishop of Rome, Pope Francis.

### The Diocese of Portsmouth

Our Diocese is spread across five counties on England's South Coast, and the Channel Islands. We are the local Church for the whole of Hampshire, Berkshire, the Isle of Wight, Jersey, and the Bailiwick of Guernsey as well as the Southern Part of Oxfordshire and the Eastern part of Dorset.

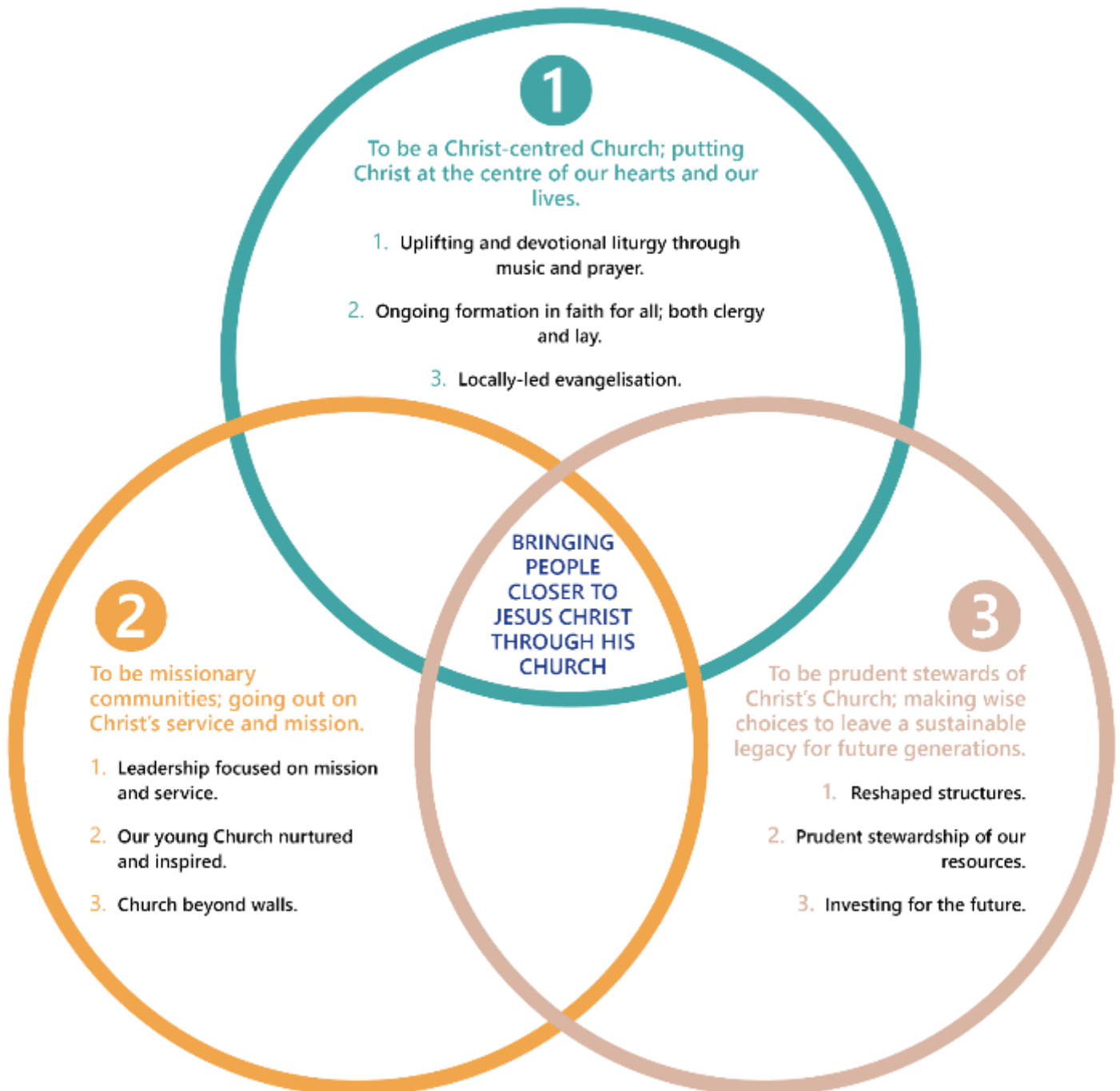
We are made up of 87 Parishes in 24 Pastoral Areas, for a total of 136 Churches. We have 115 priests, 40 Deacons, 35 houses of religious brothers and sisters, and a Catholic population of more than a quarter of a million.

We belong to the province of Southwark, which covers the whole south coast from Kent to Cornwall. Our Metropolitan is the Archbishop of Southwark. Our province also includes the Archdiocese of Southwark, the Diocese of Arundel and Brighton, and the Diocese of Plymouth.



## Ten-Year Mission Plan

*You Will Be My Witnesses* in summary



## Role Purpose

The Director of Finance is a key member of the Senior Leadership Team, responsible for strategic financial leadership and ensuring the financial sustainability of the Diocese. This role encompasses treasury management, investment strategy, risk management, IT oversight, and long-term financial planning. It also involves leading and developing a resilient and professional finance team.

The Director of Finance must balance financial prudence with pastoral priorities, fostering trust with clergy, lay leaders, and stakeholders while driving financial and operational efficiencies.

## Key Responsibilities

### • **Strategic Financial Leadership**

- Develop and implement a financial strategy aligned with the Diocese’s mission and long-term objectives.
- Provide financial analysis, forecasting, and risk management to support strategic decision-making.
- Ensure compliance with Canon Law, UK financial regulations, and charity law across all jurisdictions.
- Advise the Bishop, COO, Trustees, and key leaders on all aspects of financial management.
- Attend senior board and committee meetings presenting clear and insightful financial reports.

### • **Treasury & Investment Management**

- Oversee treasury operations, ensuring effective cash flow management and financial sustainability.
- Lead on investment strategy, working with the Investment Committee and external advisors to maximise ethical and responsible investment returns.
- Regularly review Restricted and Designated Funds to ensure compliance with Diocesan policies and procedures for such funds.

### • **Leadership of the Finance Team**

- Provide strong leadership, fostering a culture of excellence, accountability, and continuous improvement.
- Develop and mentor finance staff, ensuring they have the skills and support needed to succeed.

- Ensure the efficient operation of financial systems, budgeting, reporting, and internal controls.
- Promote collaboration across diocesan departments, ensuring effective financial stewardship at all levels.
- **Financial Oversight, Risk Management & Investigations**
  - Oversee fraud risk management, implementing robust controls to identify, prevent, and address financial irregularities, particularly in parish accounts.
  - Develop and maintain a Financial Risk Register, identifying and mitigating key risks across the Diocese, including fraud, liquidity, compliance, and operational risks.
  - Regularly review and update the Risk Register, ensuring risks are assessed, mitigated, and reported to senior leadership and trustees.
  - Establish and implement risk management strategies, embedding a culture of financial accountability across the Diocese.
  - Provide audit support and financial guidance to parishes, ensuring adherence to best practices and regulatory requirements.
  - Lead the development of annual budgets, ensuring alignment with diocesan strategy and long-term financial sustainability.
  - Develop and maintain long-term financial forecasts, assessing future income, expenditure, and funding requirements.
  - Lead and manage complex financial investigations, ensuring transparency, accuracy, and compliance.
- **Financial Planning & Parish Support**
  - Provide strategic financial support to parishes, schools, and diocesan agencies, helping them develop long-term sustainability plans.
  - Offer guidance on budgeting, financial controls, and fundraising strategies.
  - Develop and implement financial training for clergy and parish finance teams to improve financial literacy and compliance.
  - Operational & IT Leadership
    - Lead the IT strategy, ensuring digital transformation aligns with financial and operational objectives.
    - Work with IT providers to ensure cybersecurity, data protection, and technology governance.

- Embed and oversee financial systems and processes, driving efficiency through modern financial software and automation.

- **Payroll**

- Lead the payroll function working closely with the HR manager to deliver a reliable and accurate service for employees. This will include the effective use of the designated payroll IT system.

- **Governance, Reporting & Compliance**

- Ensure full compliance with accounting standards, charity law, and internal policies across all jurisdictions.
- Delivery of the Financial Annual Report and Accounts to agreed timescales.
- Develop and update key policies and procedures to ensure financial governance and accountability.
- Work closely with Trustees, external auditors, and regulatory bodies to maintain transparency and good governance.
- Implement robust internal financial controls to safeguard diocesan assets and mitigate risks.
- Develop a standard suite of financial reports to enable informed strategic and operational decision-making for the Board of Trustees and senior leaders.
- Timely production of monthly management accounts and cashflow analysis

- **Leadership & Stakeholder Engagement**

- Act as a trusted advisor to the Bishop, clergy, Trustees, and Senior Leadership Team.
- Communicate complex financial information clearly and persuasively to both finance professionals and non-experts.
- Build strong relationships with internal and external stakeholders, ensuring financial decisions support the Diocese's mission.

- **Other Duties**

- Undertake any other reasonable duties required by line manager.

## Director of Finance – Specification

<b>Competence, Expertise and Knowledge:</b>	
<b>Essential</b>	<ul style="list-style-type: none"> <li>• Degree-level education (or equivalent professional qualification/experience).</li> <li>• A qualified accountant (ACA, ACCA, CIMA, or equivalent).</li> <li>• Extensive financial leadership experience, ideally within charities, faith-based organisations, or complex institutions.</li> <li>• Proven expertise in treasury and investment management, with experience in ethical investment strategies.</li> <li>• Strong IT acumen, with experience in financial systems, digital transformation, and IT governance.</li> <li>• Excellent leadership and people management skills, with experience leading and developing high-performing teams.</li> <li>• Strong interpersonal and communication skills, with the ability to engage clergy, Trustees, and external stakeholders effectively.</li> <li>• Confident public speaking and presentation skills, with the ability to deliver complex financial information in an engaging and accessible manner.</li> <li>• Exceptional written communication skills, with the ability to produce high-quality financial reports and strategic documents.</li> <li>• Knowledge of and commitment to the teachings, values, and mission of the Catholic Church.</li> <li>• Strategic thinker, with the ability to balance financial discipline with pastoral priorities.</li> <li>• A full, clean UK driving licence, with the ability to travel across the Diocese, including the Channel Islands.</li> </ul>
<b>Desirable</b>	<ul style="list-style-type: none"> <li>• Knowledge of Canon Law, charity governance, and ecclesiastical structures.</li> <li>• Experience working in a faith-based or mission-driven organisation.</li> </ul>

## Salary, Benefits & Location

This role will be working 37.5 hours per week, offering a competitive salary of £80,000 - £85,000 per annum.

Based at St. Edmund House, Bishop Crispian Way, Portsmouth, PO1 3QA, with regular travel across the Diocese to parishes and diocesan meetings, including the Channel Islands which may require overnight stays.

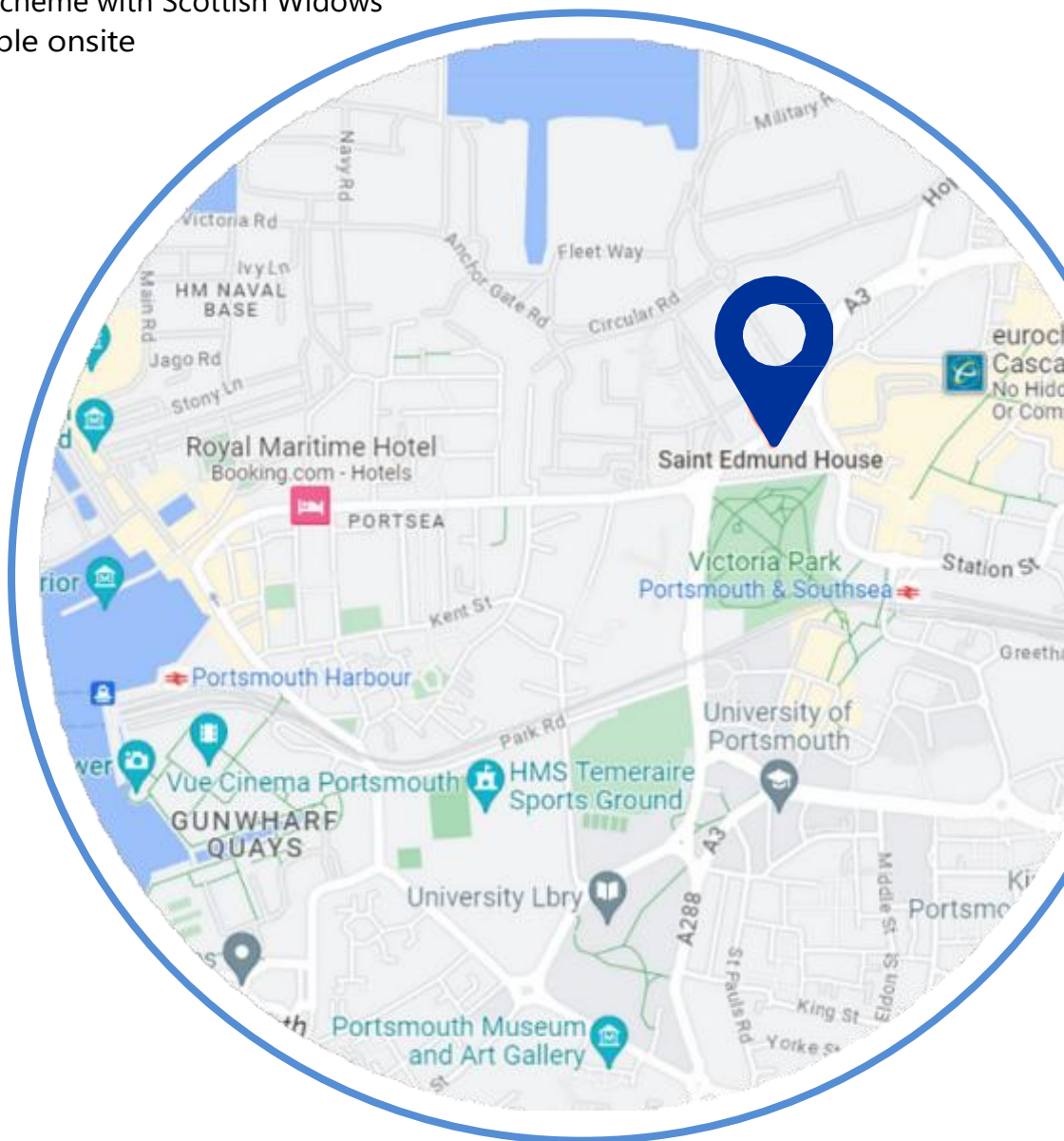
Please note, for this role a full driving licence and access to a vehicle will be required.

Employee Benefits:

- 25 days holiday plus bank holidays
- Life Assurance and Employee Wellbeing
- Contributory pension scheme with Scottish Widows
- Free Parking is available onsite

## Head Office

St. Edmund House  
Bishop Crispian Way  
Portsmouth  
Hampshire  
PO1 3QA





## Application Information

Please submit your CV and cover letter outlining your relevant experience and explaining your interest in this position and send to [recruitment@portsmouthdiocese.org.uk](mailto:recruitment@portsmouthdiocese.org.uk)

The closing date for applications is Thursday 24<sup>th</sup> April 2025, at 5.00pm.

## Interview Information

You will be notified shortly after the closing date, should we wish to progress your application and invite you to an interview.

First stage interviews via Teams will take place on Tuesday 6<sup>th</sup> May 2025 and second stage in person interviews will take place on Thursday 15<sup>th</sup> May 2025.

## Appointment

Any offer of employment to work at the Catholic Diocese of Portsmouth is conditional upon receipt of two satisfactory employment references, provision of relevant certification of qualifications held, and completion of pre-employment checks.

You must have a valid UK Right to Work, as the Catholic Diocese of Portsmouth does not offer UK Visa Sponsorship.

This position is subject to the completion of an initial probationary period of six months.