



Executive Director of
Finance and Technology

Welcome

Dear Candidate,

Thank you for your interest in becoming our new Executive Director of Finance and Technology.

If you are looking for a role that is equally challenging and rewarding, and where your day-to-day work makes a real difference to people's lives, then you're in the right place.

Advance is an award winning provider that exists to transform the lives of people with a disability or mental health condition by providing the best quality housing and support services – to enable them to live the lives they choose, achieve their personal goals, feel valued and know their voices are heard.

The Executive Director of Finance and Technology is a key position within our organisation providing strategic leadership of all of our finance, business assurance and technology functions across the whole of our organisation. As a member of the executive leadership team, you will champion innovation and excellence in care in everything that we do. We pride ourselves on the quality of our support, but are not complacent and we are constantly striving for improvements in the ways that we work and the support that we offer. We cannot deliver our priorities without effective infrastructure, sound financial management and good governance. In this role, you will provide the backbone for a well-run organisation, enabling us to succeed in our mission. We are offering a fantastic opportunity to join a truly pioneering organisation and go on to make a lasting, tangible difference to society.

We are seeking a strategic leader with in-depth knowledge of finance and technology, and experience of engaging with a Board to ensure that the operations of the association are fully aligned and that we have a clear financial strategy that ensures our future sustainability. You will be commercially and digitally astute and will work closely with the Chief Executive and the wider leadership team to lead the association toward sustainable success with innovation and creativity. Importantly we are looking for someone with a strong commitment to our work, our values and a transparent, accountable and compassionate leadership style. We need someone who will be able to lead across the whole organisation, model excellent leadership behaviours and work as an engaged and collaborative colleague committed to our vision.

Wherever you are working, you will value the important role that Advance plays and will be as energetic and personally motivated as we are by the opportunity to support people with learning difficulties and mental health conditions.

I very much look forward to hearing from you.

With best wishes,

Julie Layton
Chief Executive

About Advance

Advance provides housing and support to people with learning disabilities and mental health conditions across the UK. We are a registered society under the Co-operative and Community Benefit Societies Act 2014 and a Registered Housing Provider.

Our vision is to transform lives. Everything we've ever done was because someone, somewhere, wanted something different and better out of life and we were determined to support them to make it happen.

We were established in 1974 when we supported four people coming out of institutional care who had a dream of living independently in the community. Our solution was to buy a house on a city street, fill it with furniture, and help them settle in. Since then, we've learned to do things a bit differently, and our solution doesn't stop at a front door and a comfy sofa. These days we support thousands of people at home and in the community – people who start from a position of disadvantage due to their health or their disability and who want more choice, more control and more opportunities. Where we don't have the knowledge to support people we learn, so that we can get it right; where we can't provide a solution, we'll find a local partner who can.

People's expectations change as their lives change. We are not afraid to get on and meet those expectations in new, forward-thinking ways: making the status and security of home ownership available to people with disabilities or mental health issues with nearly 600 people buying a share in their own home; or providing both a suitable home and support to people who have complex needs so they gain more stability and control over their lives.

We've come a long way. The number of people we work with across England has grown from 4 to thousands and the range of things they trust us to provide keeps growing. We have won plenty of awards that tell us we are doing a good job but we continue to challenge ourselves to be better and to enable more people to live the lives they choose, achieve their personal goals, feel valued and know their voices are heard.

Our Vision and Values

Our vision is to transform the lives of people with a disability or mental health condition by providing the best quality housing and support services. We want to enable our customers to live the lives they choose, achieve their personal goals, feel valued and know their voices are heard.

The five PRIDE values set out below are embedded across the organisation. They form the basis of the way we work together to support our customers.

Partnership: We work in partnership with our customers and build better relationships with others that help us serve our customers better.

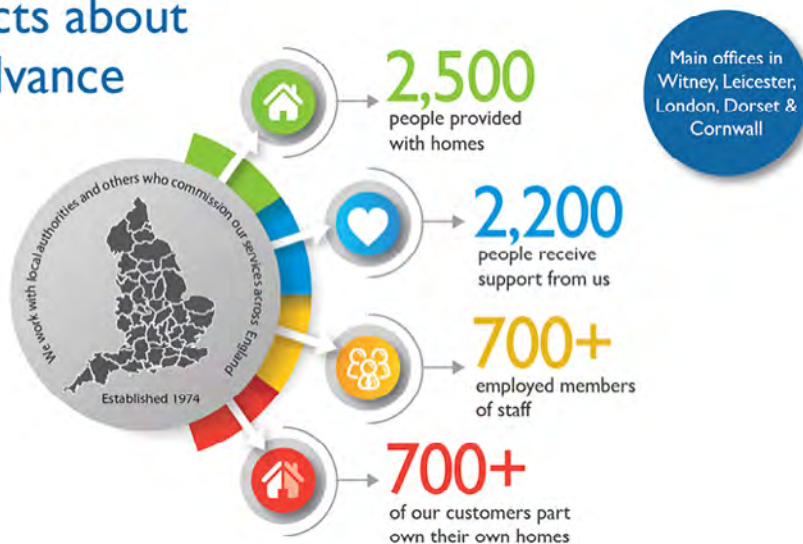
Respect: We treat our customers, colleagues and others as we would like to be treated.

Innovation: We are keen to try new things - especially when we can make things better for our customers.

Drive: We do the right thing at the right time and everything we do is driven by our customers' needs.

Efficiency: We make the best use of our resources, maximising efficiency, so we can deliver the best services for our customers.

Facts about Advance



Our Strategy

In recent years we have made considerable progress against our strategic objectives. Staff and customer satisfaction remains strong. We continue to enable more people to own a home through shared ownership and we have developed new rented properties. We have opened new housing and support services and won contracts to deliver more support, based on a strong reputation for good quality services. We delivered our value for money commitments while investing in technology, the quality of our homes and the development of staff.

Our strategy for 2020-2023 sees us focus on:

- Delivering Quality Homes and Services - which make a difference to people's lives.
- Sustainable Growth - so that more people get to benefit from our services.
- High-Performing Organisation - being the best organisation we can be.

This focus will assist us in improving the quality of our homes and services and in growing the business. The third strategic objective will support our quality and growth ambitions: through improving our financial strength, recruiting, retaining and developing the best people, investing in technology, being efficient and delivering value for money in all we do. We want to maintain a healthy business in which risks are robustly managed and build strong foundations to underpin the delivery of quality services and growth of the organisation.

We are an ambitious organisation and want to increase the number of people who benefit from our housing and support services. We will continue to increase our services for people with complex needs or challenging behaviour. We will seek opportunities to collaborate, partner or merge with others where it enables us to grow, and realise broader organisational benefit. We will focus on building expertise, investing in the skills and training required to deliver long-term growth.

We will develop a high performance/high commitment culture by investing in our people and developing our leadership and management skills. We want to attract new talent at all levels of the organisation and meet the growing aspirations of a new generation in the workforce. We will promote flexible working and provide our workforce with systems and technology that deliver high quality services. We will innovate and invest in technology to drive change. We will capture high quality data and management information to inform decision making and drive sustainable growth.

Value for money

Helping our customers achieve their ambitions drives everything we do. Our focus on **Value for Money** is really important to us. It helps make sure we use our resources of people, houses, money and systems in the best way possible. We are not seeking to operate at the lowest unit cost. Our vision is to deliver the best quality housing and support services to enable our customers to live the lives they choose, achieve their personal goals, feel valued and know their voices are heard.

Learn more about our **Strategy**, progress and **financial plans** plus our commitment to customer engagement on our website: www.advanceuk.org and on our social media channels and newsletters.

Role Profile

Role Title: Executive Director of Finance and Technology

Responsible to: Chief Executive

A member of the Advance Executive Leadership Team responsible through the Chief Executive to the Board for shaping and delivery of our corporate strategy, the role holder:

- Provides leadership across financial management and reporting to our Board enhancing financial systems, procedures, and controls to deliver our business plan, annual budgets, and wider corporate objectives
- Partners across the Leadership Team to drive our strategy, business development and consolidate our financial performance and capital position to fulfil our growth aspirations
- Provides business assurance and accurate performance reporting and advisory across all directorates of our business
- Shapes our digital strategy and owns its implementation across all our directorates to provide a consistent and high-performance experience for our customers and employees
- Inspires, enthuses, engages, and leads our committed Finance, Business Assurance and Technology directorate to deliver high performance and enable a culture of excellence, nurture and care that exemplifies our PRIDE values (Partnership, Respect, Innovation, Drive and Efficiency).

Finance, Treasury and Procurement

- Develops our value for money financial strategy fully reflecting our commitment to growth, sustainability and societal impact and leading its robust implementation while ensuring the protection of our assets and resources
- Directs all forecasting, planning, budgeting, tracking KPIs and reporting across Advance to ensure accurate and reliable management accounts including P&L, Balance Sheet, Cash Flow and rolling forecasts
- Ensures medium and long-range financial planning is carried out to support business objectives and meet requirements of regulators and our lenders
- Provides accurate, insightful financial performance reports in a timely manner to our Board and leadership teams and appropriate advisory to steer our business towards high performance and achieve our corporate purpose
- Directs and leads our Treasury Management capability, including raising capital funds and sufficient working capital alongside appropriate investment policies and procedures
- Directs the finance, accounting, treasury and procurement function and leads the optimisation, standardisation, and automation of main financial processes, procurement processes from end to end achieving accuracy, reliability, speed, and efficiency.

Business Assurance and Performance

- Executive lead on risk management ensuring comprehensive identification of corporate and business risks across our entire business, regular monitoring and to Audit Committee and Board; advising and supporting individual business areas better manage risk through proper and robust implementation of mitigation strategies
- Ensures effective arrangements for Business Continuity & Disaster Recovery are in place and are regularly tested
- Secures and maintains appropriate quality accreditations, including ISO9001 and drives its integration across all areas of our business operations ensuring consistency and high quality service delivery
- Leads our Internal Audit & Business Assurance functions ensuring that we actively manage the risk of fraud, wrongful acts, and misrepresentation; ensures our employees and suppliers understand their obligations and provides accurate and timely reporting to Audit Committee and Board.

Information Technology

- Creates and implements a digital by design ICT strategy and leads its effective implementation across all directorates of Advance to achieve a digitally mature organisation that meets the needs of all its customers and employees
- Ensures the development and implementation of a comprehensive forward looking digital ecosystem across Advance integrating systems architecture, data warehousing and business intelligence to support delivery of our current and future aspirations
- Ensures a robust, effective, and reliable IT infrastructure capability that enables all directorates to achieve high performance.

Culture, Values and Behaviours

- Ensure Advance maintain a strong customer focused approach at the heart of all it does and enable the organisation to best manage these customer relationships
- Promote the values of Advance and its commitment to equality and diversity and specifically enabling differently abled people to realise their potential as individuals
- Ensure that Advance service delivery reflects the diversity of the customer groups.



Knowledge and Experience

- A qualified accountant with unblemished registration with a recognised accountancy body, together with evidence of continuing professional development
- Leadership experience within a complex, dispersed organisation, with demonstrable experience of engaging with and motivating a multicultural staff team
- Experience of leading a finance function and track record of successfully building and leading a staff team in this sector
- Evidence of achievement in delivering effective financial strategies, including significant revenue and capital budgets
- Evidence of successful engagement in corporate management and participation in the formulation of corporate objectives, policies, and strategies, including business planning
- Good understanding of Information Communication Technology and its role in service delivery marketing and communications techniques and an ability to apply these in the service sector
- Understanding the role of strong financial management in meeting the wider objectives of the organisation
- Successful engagement in corporate management and participation in the formulation of corporate objectives, policies and strategies, including business planning
- Evidence of engaging and dealing with a range of stakeholders including regulators, funders, statutory and internal auditors and professional advisers
- A track record of systems implementation and information technology, outsourcing, shared services, GDPR and digital technologies
- A relevant management qualification or equivalent experience such as leading a finance function.

Desirable

- Understanding of quality management techniques and achieving external accreditations. An understanding of performance management, including the various Quality Standards, and continuous service improvement techniques
- Ability to secure strong commercial performance while delivering social outcomes
- Experience of working in a housing provider and/or charity or care sector
- Experience of assessing and undertaking mergers & acquisitions.

Skills and Abilities

- Strong emotional intelligence – develops high levels of engagement with their teams and can give examples of how they have inspired people with their vision for the future
- The ability to provide a strong customer service orientation ensuring our central services support individual customers' needs and aspirations
- Intellectual flexibility to move easily between significant detail and the wider picture
- Ability to interpret the wider operating environment and economic conditions and to enable the organisation to develop appropriate responses to these
- Negotiation skills and the ability to apply different techniques to varying situations
- Business assurance systems and processes and risk management
- Performance management and ability to challenge underperformance in a constructive fashion.

Style and Behaviours

- High integrity and good governance, able to win respect of colleagues and to ensure that the highest standards of probity are maintained
- Personally committed to diversity; treating others with dignity and respect, and with a real desire to understand and meet diverse customer needs and aspirations
- Able to command the trust and respect of fellow Directors
- Able to present a credible leadership style to our customers, families, staff and commissioners
- Strive to continually improve the quality of services provided
- Show determination to achieve targets and objectives
- Define and monitor performance against targets and takes remedial action where required
- Able to challenge underperformance constructively
- Committed to accountability, openness, transparency and equality of opportunity.

Key relationships:

Internal

- Board Members and Committees, providing reports, assurance and advisory
- Executive Directors and Managers to partner directorate performance achievement
- Employees across Advance to drive understanding and build organisational capability
- Employee consultative forum 'Voice' to share organisational performance.

External

- Regulators, to maintain full compliance and address any queries
- Banks and Financial Institutions, for raising capital and building investor relations
- Statutory Auditors, for timely, accurate and transparency in annual reporting
- Suppliers, to ensure rigorous selection, performance management and compliance
- Industry Associations, to build awareness and confidence in the Advance brand
- Customers, to provide assurance and deliver high quality accurate services.

Role Scope and Performance Indicators

- Set up and delivery of all corporate performance financial indicators, month end and statutory accounts and forecast accuracy
- Accurate and timely completion of all end-to-end finance, procurement, and treasury processes
- Achievement of all business assurance key performance indicators
- Achievement of Systems, IT performance indicators and IT infrastructure
- Inspired organisational leadership and directorate
- Timely reporting and mitigation of risks.

Our PRIDE Behaviours

Partnership:

- You work well with others, including customers and colleagues
- You make lots of new contacts and connections
- You share your knowledge and learning with others.

Respect:

- You are good at listening to and learning from others
- You are positive and respond to feedback openly and honestly
- You want to see things from the customers' perspective.

Innovation:

- You look for new or different ideas or solutions
- You are willing to change routine ways of working
- You like sharing ideas with colleagues and motivating them to make changes.

Drive:

- You are punctual and deliver work in a timely way
- You understand Advance's, your team's and your own plans and priorities
- You can explain how far you have got with work and can offer realistic timeframes for completion of the work.

Efficiency:

- You plan your work carefully
- You look for ways to adopt and share 'best practice'
- You try to save resources wherever possible (e.g. by considering how to save money, being environmentally friendly, using data systems etc.).



Terms of Appointment

Salary	This role will offer a salary of circa £115,000.
Location	This role can be based remotely or from any of our main offices, however the post holder will be required to travel nationally as required.
Pension	Contributory pension scheme between 3% -5%.
Annual leave	25 days annual leave + statutory holidays. Holiday entitlement increases by one day of each year of service, up to 5 years.



How to Apply

We hope you will consider making an application. If you have questions about the appointment and would find it helpful to have an informal conversation, please contact Juliet.Brown@starfishsearch.com and we will be happy to arrange a call.

To make an application, please go to <https://starfishsearch.com/jobs/ad-ed-fin-tech/> and click on the apply now button, with the following prepared:

- Your CV (no more than three sides)
- A supporting statement that sets out why you think this role is the right move for you and how you meet the Knowledge and Experience criteria

Please also ensure you have completed and submitted the equal opportunities monitoring form that appears on this site as you submit your application. The information you provide will be treated as confidential and used for statistical purposes only. The form will not be treated as part of your application.

Closing date is Monday 25th July 2022.

