



March 2024

Dear prospective candidate

Director Finance and Organisational Performance  
Recruitment Information pack

Since its creation in 1987 Education for Health has been providing education and training to Healthcare Professionals. We provide a range of Higher Education courses from Certificate to a full master's programme along with a growing range of Essentials, Refreshers and webinars across a range of long-term conditions.

During the pandemic we created a new model of delivery – an interactive blended online learning model (IBOL), enabling people to access their learning at a time and a pace that suits them. This is supplemented by live, interactive webinars and recorded lectures.

This is a pivotal time for the charity: the pandemic had an adverse impact on our income as weary healthcare professionals had no time or energy to devote to training. However, it provided us with an ideal opportunity to refresh our products using state of the art authoring tools and develop a new Learning Management System (LMS). The result was an ambitious automation programme, organisational restructure and functional realignment.

We also used the time review our market and create new products. By bringing together sales, marketing, communications and customer focus into one directorate, we believe it will create a better coherence to enable us to achieve our ambitious plans. We started the new financial year on a good footing with a plan in place to grow income from £1.5million to £1.8million this financial year, with similar growth each year to 2025. We are confident there is considerable potential to raise the profile of the charity to maximise impact and growth by extending our customer base geographically and widening our reach through strategic partnerships, campaigns, and working with more opinion leaders.

As a member of the Executive Team, the Director of Finance and Organisational Performance will use their experience, ideas, and knowledge of finance and organisational performance to lead Education for Health's Finance, Systems, Information, Data and People functions to fulfil our business plan, supporting healthcare professionals to improve health outcomes.



Applications by cv to [l.edwards@educationforhealth.org](mailto:l.edwards@educationforhealth.org) along with a covering letter identifying your skills / experience match to the role.

Closing date: 8<sup>th</sup> April 2024

Interviews will take place on in our offices in Wellesbourne, Warwickshire on 16<sup>th</sup> April 2024.

If you would like an informal conversation prior to applying, please contact me at the above email.

Kind regards

A handwritten signature in grey ink, appearing to read 'Linda Edwards'.

Dr Linda Edwards  
Chief Executive

Pack includes:

- Job description
- The Education for Health 3-year plan



## Director of Finance and Organisational Performance Job Description

Reports to: Chief Executive

Location:

- Hybrid working, min 2 days a week in Wellesbourne, Warwickshire. Mandated office day - Wednesday

Hours: Full time

Salary: £65k

### Job Overview

The Director of Finance and Organisational Performance is a member of the Executive Team playing a key role in the leadership of the charity. They are responsible for leading the Finance, Information Technology, Data, People, Facilities and Governance team and functions across the organisation. They are also responsible for effective performance monitoring, optimising the use of systems and technology across the organisation. S/he is the Company Secretary.

### Key Responsibilities

- Ensures the efficient and effective management of all the financial affairs of the organisation including financial strategy, investment portfolio, cash flow, financial accounting, management accounting, statutory reporting, external and internal audit.
- Maximises the organisation's investment in property and facilities, ensuring the provision of a working environment aligned with operational needs.
- Ensures that strong governance and business controls are developed and deployed in line with agreed risk appetite and legal, regulatory and compliance frameworks providing the Trustees and Chief Executive with appropriate assurance.
- Leads the overall information governance for the organisation; evolving policy and practice in line with the external environment, chairing internal groups, sponsoring projects and programmes as required to ensure the organisation manages data effectively and in line with its value to our organisation aims.
- Leads the identification and management of risks to the organisation; collaborates proactively with colleagues to solve problems and remove obstacles.
- Drives long term financial modelling of the portfolio of activities, conducting investment appraisals for new areas of activity as required.



- Ensures the organisation is equipped to make good decisions through robust, timely business intelligence, and performance against plan; closely monitors the budget and advises any actions required.
- Supports the Chief Executive and Executive Team with new business development and change management initiatives, including negotiating external contractual partnerships as required.
- Monitors and reports on overall financial position, identifying risks and mitigations.
- Provide assurance that all directorate plans, investment cases and forecasts are underpinned by robust assumptions and financial models.
- Leads the Finance and Systems, Information & Data (SID) teams to ensure that systems and processes are efficient, effective, and facilitate operational delivery across the organisation.
- Leads the strategic development and delivery of the agreed technology strategy and roadmap, ensuring a robust, efficient, and cost-effective infrastructure to best meet the current and future requirements of the organisation.
- Monitors, analyses, and reports to the Chief Executive and Board of Trustees on the organisation's performance against agreed targets and objectives.
- Supports non finance staff in developing an understanding of the charity's finances enabling them to effectively manage their areas of responsibility.
- Coordinates the business of the Finance, Audit and Risk Committee (FARC) providing a clear assessment of the organisations financial position, recommending any necessary actions.
- Ensures that all activity is ethical and complies with latest regulatory requirements. Act as Company Secretary and Data Controller.

## Leadership

- As a member of the Executive Team contribute to, and be jointly responsible for, the development and delivery of the charity's organisational strategy and the effective leadership of the organisation, including contribution to Board and Committees, active risk management, cross directorate change projects or major new developments as required.
- Motivates & leads an ambitious and effective finance and SID team to deliver compliant, reliable, resilient and cost-effective activities to meet organisation's needs.
- Ensures the right capacity, processes, facilities, technologies, and tools are in place within the charity to support the overall organisation while driving efficiency; develop and deliver cases for investment and cost improvement plans as required.
- Demonstrates by example effective cross-team working, building, and strengthening relationships with other directorates to break down silos and integrate a culture of business partnering into the organisation.



These contents are not exhaustive or exclusive and post holders may be required to undertake additional duties from time to time in line with business needs.

## Person Specification

### Essential skills, knowledge, and experience

- A qualified accountant (CCAB qualified)
- Confidence with technology, including knowledge of developing technology strategy, building digital products/services and using technology to drive productivity.
- Good understanding of information governance.
- Knowledge of process mapping and business improvement methodologies.
- Knowledge of the characteristics of high performing teams and how to build them.
- Knowledge of the legal, compliance and risk-management processes necessary to deliver an effective People function, and talent management strategies to drive high performance.
- An understanding of the charity sector and commitment to our mission.
- Commitment to undertake continuing professional development as required to fulfil the role.

### Skills and Experience

- Finance experience at a senior level, guiding executive and non-executive colleagues.
- An experienced senior leader with a track record of delivering ambitious goals in fast-moving organisations across a broad portfolio of functions including finance, technology, and people (people is desirable).
- Recent experience of managing governance, compliance and risk management within an organisation of at least similar complexity.
- Strong strategic thinker and commitment to the charitable objectives of the organisation.
- Highly confident in data analysis and business intelligence, bringing significant rigour to business planning, budgeting, and performance management.
- Sound business judgement, the ability to identify and proactively manage risks, and experience of leading change effectively.
- Commercially astute: strong commercial flair with excellent business management skills.
- Excellent operational and project management skills, able to deliver projects efficiently and with planned benefits realised.
- Excellent people management skills and the ability to coach and support diverse teams to achieve great things.
- Excellent organisational and budgeting skills, including the ability to prioritise workloads, reallocate resources and meet shifting demands.



- Good communication skills, in particular report writing, negotiation and presentation skills.
- Strong interpersonal and influencing skills with clear commitment to collaborative working and ability to build strong and effective internal relationships.
- Holds self and others to high standards of governance and ethics, developing and implementing processes and programmes as required ensuring ethical and regulatory compliance is systematically delivered.
- A pro-active, credible relationship-builder with internal and external stakeholders including Trustees.
- Ability to assess and manage risks.

#### *Personal Characteristics*

- A commitment to working efficiently and to a high standard.
- Willingness to travel when required.
- Demonstrates a flexible and adaptable attitude towards meeting and exceeding the requirements and needs of customers.
- Leads by example.
- Thrives under pressure and can navigate the challenges of the Executive Team in an uncertain environment.

March 2024