



Altair

Finance and Investment Manager/
Depute Director

Paragon Housing Association Ltd

Recruitment Pack
June 2017



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1 | Welcome letter

Welcome to Paragon Housing Association and thank you for your interest in the position of Finance and Investment Manager/Depute Director.

Paragon Housing Association is a well-established and stable housing association with a committed and enthusiastic management committee and staff team. We provide landlord services to around 1,400 properties in Falkirk, Clackmannanshire and Stirling local authority areas. We operate a factoring service for around 100 owners in flatted properties and have a wider factoring responsibility in estates across our area of operation.

Our turnover in 2015/16 was £7.6 million comprising of rental income and income from other activities with an operating surplus of £1.6 million. We employ the equivalent of 25 full-time employees.

We are seeking a qualified finance professional with good strategic skills, an understanding of the affordable housing sector and the ability to communicate complex financial issues to non-finance people.

Broad financial knowledge and experience including treasury management is essential and experience in development finance is desirable but, in addition to professional excellence, we are looking for a team player with experience of working with a management committee or board. Corporate leadership experience is also essential as the postholder will deputise for me in my absence.

This is an exciting time to be joining Paragon HA as we embark on a period of growth through a development programme and bed down our recent organisation-wide restructuring programme. In addition to the financial responsibilities, the postholder will be involved in our development and asset management programme and developing our value for money work. Leading on maximising efficiencies from our recently implemented Aareon QL system will be a key role for the postholder.

We hope that after reading this pack you are enthused about Paragon HA and the opportunities presented by this position. If you would like to have a confidential discussion please contact me on: 01324 664966 or email me at mtorrance@paragonha.org.uk to arrange a confidential discussion.

Yours sincerely

Margaret Torrance
Director
Paragon Housing Association Limited

2 | About Paragon Housing Association

Paragon Housing Association Limited is a Registered Social Landlord holding charitable status. The Association owns and manages around 1,400 properties in Falkirk, Clackmannanshire and Stirling local authority areas. The Association operates a factoring service for around 100 owners in flatted properties and has a wider factoring responsibility in estates across its area of operation. Most of the Association's stock was originally acquired through large scale voluntary transfer from Scottish Homes and has grown through some small-scale development activities.

The Association is based in Grangemouth and delivers a variety of services to our customers including rent collection, repairs, programme of improvements, planned maintenance, housing management and factoring services. The Association currently has 25 staff posts plus two part-time cleaners.

Paragon has a strong stock investment plan in place to continue to meet the Scottish Housing Quality Standard and the Energy Efficiency Standard Social Housing by 2020. We are currently engaged in some small scale new build developments in line with our growth strategy.

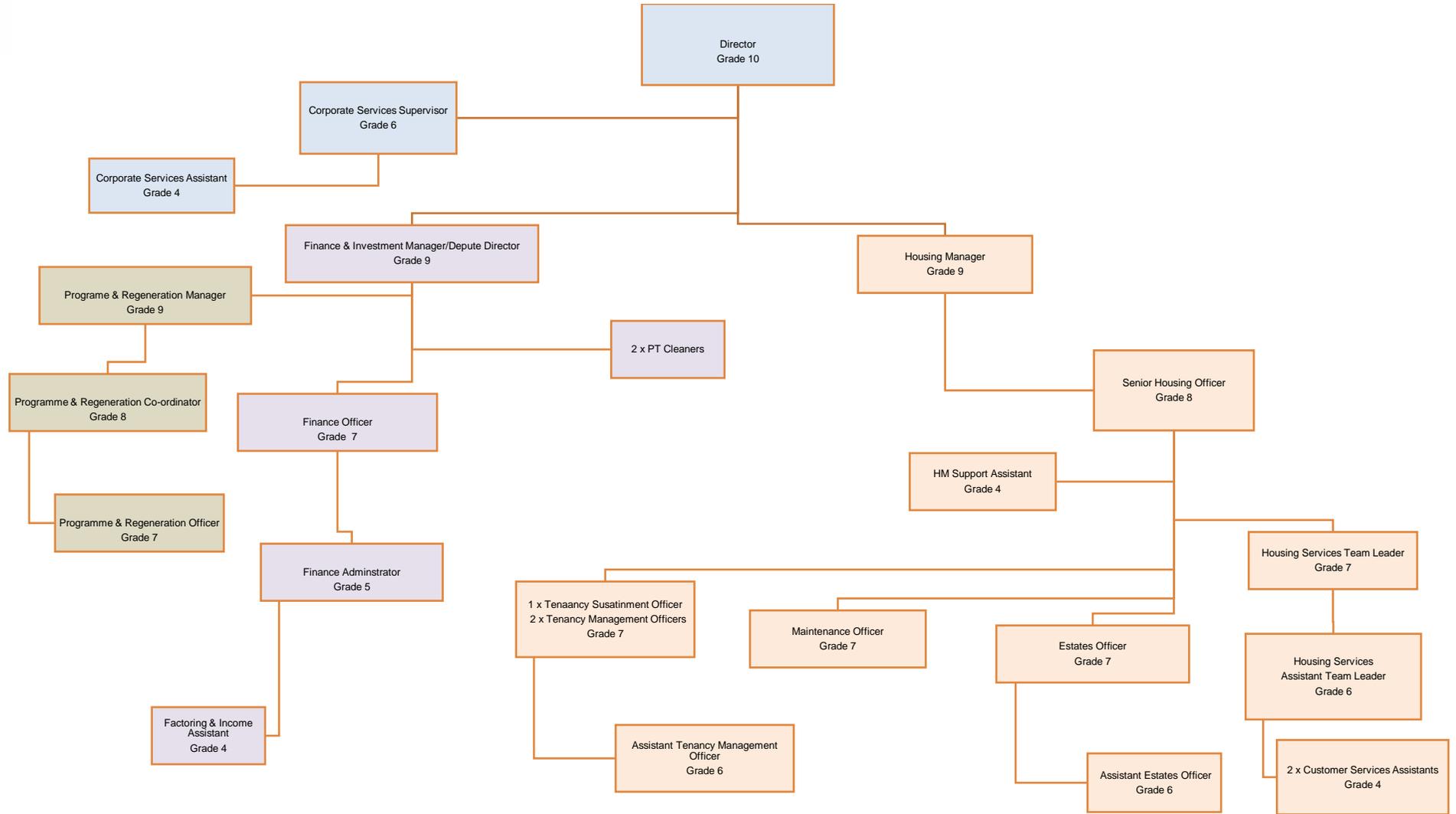
Membership of the Association is open to tenants, owners and other members of the community. The Association is controlled by an unpaid, voluntary Management Committee (elected by the members). The Management Committee is responsible for the strategic direction of the Association and policy matters. Places are filled by the various sections of the membership and we actively encourage tenants to become Management Committee members. Further information about Paragon HA such as the Tenants' Charter Report, Annual Accounts and Annual Report can be found at: www.paragonha.org.uk

Vision: *"To be a model of excellence among housing providers delivering high quality service and performance"*

Mission: *"To put the people we serve at the heart of our services and to put heart into our communities"*

Values:

- Our tenants are at the heart of everything we do
- We will work to serve the wider community
- We take pride in what we do
- We will work constructively with willing partners
- We respect and value ourselves and others
- Our belief is that things should always get better



3 | Role Profile

Job Description

JOB TITLE	DEPARTMENT
Finance and Investment Manager/Depute Director	Finance
GRADE	RESPONSIBLE TO
SMO 9 Spinal Points SM12 to SM14	Director
STAFF RESPONSIBLE FOR	
Finance, Programme and Regeneration Team	

Section 1 : Main Objectives of Post

- To deputise for the Director as required
- To support and advise the Management Committee and Director on matters relating to the financial function of the Association including the development of financial strategies, accounting systems, controls and procedures within the organisation
- To ensure the financial viability of the Association by effective and proper management of finances, operational activities and preparation of financial forecasts and plans
- To take overall responsibility for the effective performance of the finance and Investment functions
- To ensure proper scrutiny and good governance of the finance and Investment functions
- To contribute to the robust business planning and control framework by ensuring effective monitoring and reporting systems are in place
- To contribute to the strategic direction and leadership of the Association
- To support the delivery of the operational activities of the Association
- To contribute to policy formulation as a member of the Management Team
- To take overall responsibility for the day to day operation of the Finance and Investment Department

Section 2 : Accountability /Responsibility

The Finance and Investment Manager/Depute Director will:

- Report to, and deputise for, the Director
- Provide professional advice and support to the Management Committee
- Manage and develop staff in the Finance and Investment Team
- Contribute at an operational and strategic level to the work of the Association
- Ensure the effective delivery of the finance function and the asset management programme
- Ensure effective liaison with other internal teams and external stakeholders

Section 3 : Values and Behaviours
<ul style="list-style-type: none"> • To put customers at the heart of the service • To promote equality and embrace diversity • To work in a co-operative and professional manner • To undertake personal and professional development activities such as attending training and conferences • To initiate and actively take part in organisational development activities to ensure that the organisation is constantly improving and delivering a good value for money service • To positively represent the values of the organisation internally and externally • To support colleagues across the organisation to deliver organisational objectives
Section 4 : Principal Duties
NB: This is not a definitive list and may be subject to change in line with business requirements.
4.1. Performance Management
<ul style="list-style-type: none"> • To develop and report on performance targets in conjunction with the Director and Management Committee • To support the Finance and Investment Team to achieve performance targets • To closely monitor performance, including budgetary performance, and propose corrective action to maintain performance to target in line with delegated authority • To develop performance systems to ensure timeous and effective reporting of performance • To ensure all funding and regulatory returns are made timeously, accurately and in accordance with the appropriate delegated authority
4.2. Team Management and Development
<ul style="list-style-type: none"> • To effectively manage the Finance and Investment Team • To provide support to staff to ensure effective development and performance
Key Responsibilities
<ul style="list-style-type: none"> • Effectively lead the Finance and Investment Team to ensure that the finance and investment functions are delivered in accordance with the Association's policies and statutory and regulatory requirements • As part of the Association's planning process prepare Association's Annual Budget and annual Business Plan for approval by the Management Committee as well as mid and long term financial planning reports • To co-ordinate the delivery of Association's Investment Strategy effectively • To service the Audit Committee • To manage the External Audit process • To manage the Internal Audit process • To develop and maintain the Association's financial modelling systems • To ensure effective insurance arrangements in place • To manage the Treasury Management function in accordance with delegated authority including regular review of and reporting on lending and investments

- To contribute to the Association's Risk Management framework and actively control organisational risk including fraud prevention
- To be responsible for Data Protection compliance
- Contribute to ITC strategy and management
- Undertake HR functions relating to payroll and pensions
- Deputise for the Director on governance and HR matters

4.3. Strategy and Policy Development

- To contribute to the development of the overall strategic framework of the Association
- To develop a finance and investment strategy to deliver strategic goals

4.4. Resident Liaison / Participation/ Partnership Working

- To contribute to the development and delivery of the Tenant Participation Strategy

Section 5: Professional Standards

- To have a high level of knowledge of the Association's policies and procedures, regulatory standards, legal and compliance requirements
- To ensure professional standards are maintained personally and by team members including the provision of advice and support to other staff to achieve this
- To self-prioritise own workload and effectively conclude business matters
- To develop policies and procedures
- To take part in professional development activities on a regular basis
- Hold a professional finance qualification and demonstrate continuous professional development
- Have a high level of knowledge of legislation and policies and procedures and have the ability to implement these around the delivery of the function
- Contribute to the development of organisational policy and strategy

Section 6: Other

- To attend meetings and call out incidents out of hours as required
- To carry out any other reasonable duties as required by the Association

Person Specification

PART ONE	Essential/ Desirable
Training and Qualifications	
1. Accountancy qualification (ACA, ACCA, CIPFA, CIMA)	Essential
2. Evidence of continuous professional development	Desirable
Knowledge:	
3. Knowledge and understanding of the Registered Social Landlord regulatory environment or similar regulatory environment	Essential
4. Knowledge of factoring legislation	Essential
5. Knowledge of data protection legislation requirements	Essential
6. Extensive knowledge and experience of Microsoft Office products	Essential
7. Knowledge of financial modelling systems (preferably Brixx)	Essential
8. Knowledge of Charity legislation	Desirable
Experience:	
9. Broad experience in senior roles managing and developing a finance function and managing teams	Essential
10. Financial and management accounting experience including strategic data analysis, understanding and applying financial regulations and long term financial planning and cash flow management.	Essential
11. Experience of working with a senior management team as well as a governing body, providing them with support, training and guidance on financial and other corporate services functions.	Essential
12. Experience in developing and interpreting policy and procedures	Essential
13. Experience in project management	Desirable
14. Experience in delivering staff training	Desirable
PART TWO	
Skills and abilities:	
Able to take a strategic view on the current and future direction of the Association	Essential
Flexible and resilient	Essential
Able to communicate effectively verbally and in writing with customers, colleagues and external organisations	Essential
Problem solving skills	Essential
Able to identify risks and mitigating strategies	Essential
Awareness of issues around confidentiality and comply with the required legislation/policy	Essential
Awareness of issues around equalities and comply with the required legislation/policy	Essential
Other:	
Driving licence	Desirable

4 | Terms and Conditions

Remuneration and Benefits

Salary range	£55,171 to £57,752 per annum
Pension	SHAPS Final Salary or Defined Benefit Scheme (please note this will be under review shortly)
Holidays	25 days plus 15 public holidays
Hours	35 Hours per week and Flexi Time Scheme
Terms and Conditions	Paragon Housing Association is a full member of Employers in Voluntary Housing (EVH). Terms and Conditions of Employment are set through a collective bargaining framework with EVH acting as the employer's representative.

5 | Recruitment timetable

Recruitment stage	Date
Closing date	9:00am Monday 24 July 2017
Longlisting decision	w/c 31 July 2017
Online assessment	After longlisting decision
Final interviews (Paragon HA)	15 th August 2017 or 28 th August 2017

6 | Further information

For an informal and confidential discussion about the position, please contact, Margaret Torrance, Director, Paragon Housing Association Limited on: 01324 664966 or email mtorrance@paragonha.org.uk to arrange a confidential discussion.

7 | How to apply

To apply for the Finance and Investment Manager/Depute Director position at Paragon Housing Association, please go to:

<http://www.altairltd.co.uk/job/paragonALT184>

Complete our registration form and attach the following documentation (please save your files with your surname first, followed by your first name and a description of the file):

- A **detailed CV** including details of positions held (and dates), size of budgets and teams managed and key achievements
- A **supporting statement** explaining your motivation in applying for this position at Paragon Housing Association and also addressing how you meet the requirements of PART ONE of the person specification
- Full contact details (name, job title, organisation, phone and email) for **three referees** (including your current employer if applicable). Please note we will not take up references without your prior permission
- Completed “**Recruitment Monitoring Form**” (Word version is available on our website and attached as reference at Appendix 1 of this recruitment pack)

The closing date for applications is: **9:00am Monday 24 July 2017** and the job reference code is: **ALT184**.

Your application will be acknowledged and treated with strictest confidence.

Appendix 1 | Recruitment monitoring form

Post	Click here to enter text.	
Your Gender	Choose an item. <i>Select from list</i>	
Do you consider yourself to have a disability?	Choose an item. <i>Select from list</i>	
Ethnic Origin: please select one category which best describes your ethnic origin <i>Select as appropriate</i>		
White	White Scottish	<input type="checkbox"/>
	White Other British	<input type="checkbox"/>
	White Irish	<input type="checkbox"/>
	Gypsy/Traveller	<input type="checkbox"/>
	Polish	<input type="checkbox"/>
	Any Other White Background	<input type="checkbox"/>
Mixed or Multiple Ethnic Background	Any Mixed or Multiple Ethnic Background	<input type="checkbox"/>
Asian, Asian Scottish, Asian (British)	Indian	<input type="checkbox"/>
	Pakistani	<input type="checkbox"/>
	Bangladeshi	<input type="checkbox"/>
	Chinese	<input type="checkbox"/>
	Any Other Asian Background	<input type="checkbox"/>
Black, Black Scottish, Black British	Caribbean	<input type="checkbox"/>
	African	<input type="checkbox"/>
	Any Other Black Background	<input type="checkbox"/>
Other Ethnic Background	Arab, Arab Scottish or Arab British	<input type="checkbox"/>
	Any other group	<input type="checkbox"/>
<p><i>Please note that this information will not be considered as part of your application and will not be circulated to the interview panel</i></p>		

Recruitment advertising monitoring - Job reference code ALT184

How did you find out about this opportunity?

	Please indicate "YES" as appropriate
Altair e-bulletin	
Altair website	
Approached directly by Altair	
Inside Housing	
LinkedIn	
Online browsing	
Paragon Housing Association website	
Word of mouth	

Appendix 2 | Advert

Finance and Investment Manager / Depute Director**Paragon Housing Association****£55,171 to £57,752 per annum****Grangemouth**

Paragon Housing Association Limited is a Registered Social Landlord holding charitable status. The Association owns and manages around 1,400 properties in Falkirk, Clackmannanshire and Stirling local authority areas. The Association operates a factoring service for around 100 owners in flatted properties and has a wider factoring responsibility in estates across its area of operation. Most of the Association's stock was originally acquired through large scale voluntary transfer from Scottish Homes and has grown through some small-scale development activities.

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Broad financial knowledge and experience including treasury management is essential, and experience in development finance is desirable but, in addition to professional excellence, Paragon is looking for a team player with experience of working with a management committee or board. Corporate leadership experience is also essential as the post-holder will deputise for the Director in her absence.

If you would like to know more about this role, please visit altairtd.co.uk/job/fimdd184 and download and review the recruitment pack. If, having read the pack, you would like to have a confidential discussion about this role please contact:

- Margaret Torrance, Director, Paragon Housing Association – 01324 664966 | mtorrance@paragonha.org.uk

The closing date for applications is: **9:00am Monday 24 July 2017**. Your application will be acknowledged and treated with strictest confidence.