



**ORKNEY**  
**Housing**  
**Association**

Building **homes**, building **communities**

# Head of Finance

Recruitment Pack



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# Welcome

We are currently looking for a capable and ambitious Head of Finance – or someone looking to progress to this level - to join our Leadership Team. This important role will play a key part in shaping the financial strategy of our organisation, ensuring we maintain financial health while continuing to grow and develop our services. At Orkney Housing Association, we are committed to providing good quality, affordable homes and services for the benefit of the people and community of Orkney. Since 1985, we have built over 1100 homes and continue with ambitions for ongoing new developments. With a strong community focus, we have built a reputation for excellence in delivering housing and services that truly make a difference in people's lives.



As the Head of Finance at Orkney Housing Association, your expertise will ensure the effective strategic and operational management of our financial affairs, supporting our delivery of great customer service. Joining our established Leadership Team, you will actively contribute to the development and review of strategic, operational, and financial plans, while leading and supporting our dedicated Finance Team. We offer flexible working and a generous defined contribution pension scheme with salary sacrifice options.

You will be a qualified accountant, a supportive and inspirational leader to the staff team and possess excellent communication skills. Direct housing experience is desirable but not essential, though transferability to the sector must be evidenced. The role is based in Kirkwall in the Orkney Islands, and you must be able to sustain an office presence at this location, although some hybrid working is possible.

You may already be well aware - but Orkney is one of the best places in the country to live, offering amazing lifestyle opportunities for people at all stages of their lives and careers. Cultural and sporting opportunities abound in our island archipelago which is rich in nature and archaeological sites.

Join us in making a difference in the Orkney community through the power of social housing. We look forward to welcoming the next financial leader who will help us drive our organisation towards a bright future!

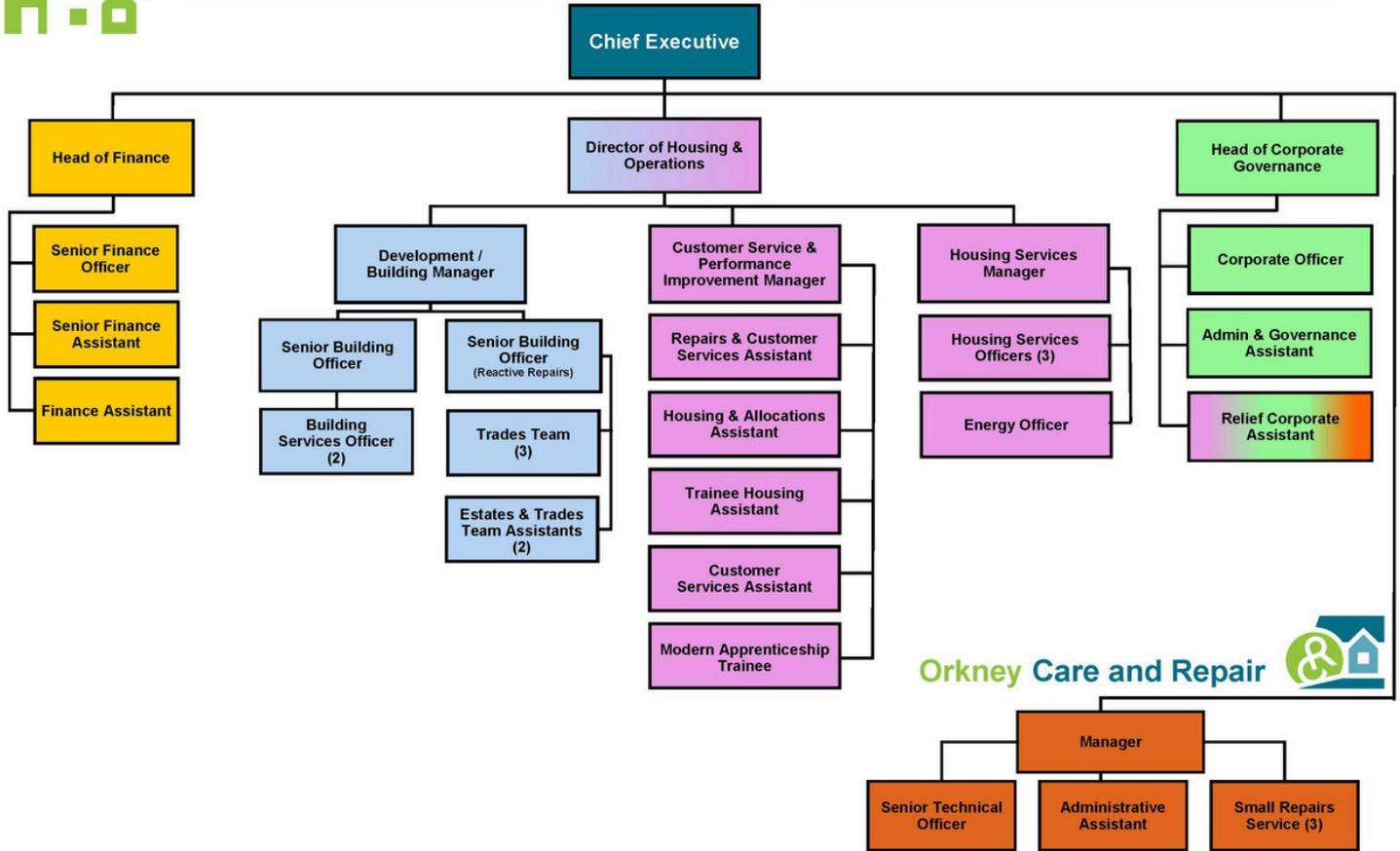
For a confidential discussion about the opportunity, please contact me directly by phone or email.

Craig Spence  
Chief Executive  
01856 875253 Ext 701 or [craig.spence@ohal.org.uk](mailto:craig.spence@ohal.org.uk)

# Organisation Chart



## Orkney Housing Association



## Our Mission

Across the Association there is a real shared understanding of, and commitment to, what we are here to do:

***“We will provide good quality affordable homes and services for the benefit of the people and community of Orkney.”***

## Our Corporate Outcomes

**A Great Place to Work  
Great Customer Service  
Contributing to a Safe & Sustainable Community**

## Our Values

We are very much embedded within the Orkney community, and much of our approach to how we do business reflects our historic approach within the community. Our “5 I’s” are the principles we live by:

- Impact:** We deliver homes and services which meet the needs of, and have a positive impact on, our customers and the community.
- Involve:** We involve staff, tenants and stakeholders, listening to them and ensure their input is valued and considered.
- Intent:** We are clear what we are doing, and communicate effectively with our customers and our community, so that we each understand expectations.
- Integrity:** We act with the highest standards of integrity and respect, working within the Regulatory Standards.
- Improve:** We seek out and take opportunities to improve, through training, efficiencies, benchmarking, sharing and learning.

## Our Vision

By doing all of this, we believe that we will deliver our long-term Vision that we will be:

***“Recognised across the country as a leading housing association that provides quality affordable housing”***

# Role Details

## Head of Finance

<b>Salary:</b>	<b>£53,736 to £60,713</b> (includes annual Distant Islands Allowance, currently £2,661)
<b>Contract:</b>	Permanent; Full-Time
<b>Hours:</b>	35 Hours per week
<b>Reporting to:</b>	Chief Executive

- Place of work: 39a Victoria Street, Kirkwall, KW15 IDN
- Core hours are 9am-5pm, Monday to Friday, though we operate a Flexitime Policy enabling you to determine your working pattern in line with operational needs.
- Annual leave entitlement of 8 weeks split between 25 annual and 15 (fixed) public holidays.
- Salaries are paid monthly in arrears by bank credit transfer on the 28th of each month (or earlier if the 28th falls on a weekend or public holiday).
- All appointments are subject to a 6 month probationary period.
- All appointments are subject to satisfactory reference and eligibility to work in the UK checks.
- Your notice period is 4 weeks whilst on probationary period then 13 weeks thereafter.
- You will be automatically enrolled into the Scottish Housing Association's Pension Scheme (SHAPS) providing you meet the auto-enrolment criteria. This is an employer and employee-defined contribution scheme.

# JOB DESCRIPTION

## Statement:

You will work in a way that shows genuine commitment to providing a great quality of service for people accessing our services. This will mean demonstrating by word, action and measurement, that the views and opinions of customers are taken into account in all aspects of service delivered by you, or by those whom you manage. You will also contribute actively to the Association's "one business" approach to working with colleagues in different parts of the organisation.

## Objectives:

- To support the Chief Executive in ensuring sound financial management of the organisation.
- To be responsible for strategic and operational leadership of the finance function of the Association.
- To ensure the financial affairs of the Association are managed in a manner conducive to the meeting of all its objectives.
- To consistently and supportively lead and manage the Association's Finance Team.
- To ensure a high standard of financial control, processing, recording and reporting across the finance function.
- To be an integral part of the Association's Leadership Team.

## Reporting to:

- Chief Executive

## Staff managed:

- Senior Finance Officer
- Senior Finance Assistant
- Finance Assistant

## Responsibilities:

- Active participation in the Association's Leadership Team.
- Play a lead role in the development and review of strategic, operational and financial plans for the Association.
- Active involvement in the Business Plan process and implementation of the business plan objectives.
- Ensure that the finance function is effectively and efficiently managed and all controls are adhered to.
- Deliver an important contribution to the development, design and implementation of the Association's Digital Strategy.
- As part of Leadership Team, ensuring all risks relating to the Association are identified, managed and reported to Committee on a regular basis.
- Ensure timely provision of accurate quarterly management accounts and other management information in a format suitable for Committee and budget holders.
- Provision of other financial information as required for the planning, monitoring and control of the Association's financial affairs.
- Management of all borrowings, investments and cash balances in compliance with the Treasury Management Strategy and ensuring compliance with loan covenants.
- Lead the Association in the negotiation of funding and refinancing needs and opportunities.
- Financial planning and budgetary control.
- Ensuring compliance with all relevant accounting standards, legislation, the Scottish Housing Regulatory Standards and good practice guidance.
- Ensuring adequate insurance cover is in place and providing information to other staff as required.
- Ensuring the maintenance of accurate and up to date loan and asset registers.
- Monitoring and recommending changes to Financial Policies.
- Monitoring expenditure on development projects and ensuring timeous draw down of grant and loan funds.

- Strategic procurement lead for the Association.
- Procurement of consultant services as required.
- Enabling innovation and improvements in working practices.

### Key Tasks:

- Maintain adequate and proper accounting and control systems to produce accurate accounting records consistent with all regulatory guidance.
- Ensure Leadership Team and Management Committee are aware of financial risk and proactively advise on appropriate monitoring techniques or strategies for minimising that risk.
- Lead the finance team in preparation of annual accounts and supporting audit schedules.
- Lead the annual external audit process, liaising with auditors and acting on any recommendations.
- Preparing and monitoring the effectiveness of the Association's Financial Procedures.
- Lead the finance team and support colleagues in preparation of annual budgets (in accordance with policy).
- Review, advise and collaborate with Housing Management colleagues in annual rent and service charge setting.
- Preparing long-term (30 year) financial projections for the Business Plan.
- Timely submission of Scottish Housing Regulator and other statutory financial returns.
- Identifying and managing investments in accordance with the Association's Treasury Management Policy and Strategy.
- Preparation of quarterly management accounts, KPIs and cashflow projections.
- Updating development cashflow projections on a monthly basis and monitoring funding requirements and reporting thereon.
- Monitoring compliance with internal financial controls as detailed in policies and procedures.
- Provision of information as required by the Chief Executive and other budget holders.
- Supporting the Management Committee and Sub Committees.

### Other Duties:

- Training of other staff as appropriate.
- Any other duties consistent with the post as required.
- Deputise for the Chief Executive as required in conjunction with other Leadership Team members.

### Authority:

- Instruction, support and supervision of managed staff.
- Responsibility for procurement and other authorities in line with the Procurement Policy and Scheme of Delegations.

### Specific Conditions of Post:

- Compliance with the Data Protection Act (2018) & UK GDPR.
- Attendance at appropriate events within and outwith Orkney.
- Occasional out of hours work.

### Working Conditions:

Hours of Work: 35 hours per week, normally 9am to 5pm (1 hour lunch break - co-ordinated with other staff to ensure continuous cover.)

Place of Work: Association's office though some home working may form part of an agreed working pattern.

## PERSON SPECIFICATION

### Post Title: Head of Finance

Criteria	Essential	Desirable
<b>Training &amp; Education</b>		
<ul style="list-style-type: none"> <li>• Qualified Accountant.</li> </ul>	✓	
<b>Skills &amp; Abilities</b>		
<ul style="list-style-type: none"> <li>• Excellent numeracy, mathematical and IT skills.</li> </ul>	✓	
<ul style="list-style-type: none"> <li>• Strong attention to detail and accuracy.</li> </ul>	✓	
<ul style="list-style-type: none"> <li>• Excellent written and verbal skills including report writing and presentation.</li> </ul>	✓	
<ul style="list-style-type: none"> <li>• Analyse complex information to make informed financial judgements and justify decisions/recommendations.</li> </ul>	✓	
<ul style="list-style-type: none"> <li>• Excellent project and operational management skills to meet demanding personal and team deadlines, ensuring all work is prioritised and delivered on time.</li> </ul>	✓	
<ul style="list-style-type: none"> <li>• Ability to consistently and supportively lead, motivate and empower a staff team.</li> </ul>	✓	
<b>Experience</b>		
<ul style="list-style-type: none"> <li>• Minimum of 5 years experience in a senior finance role.</li> </ul>	✓	
<ul style="list-style-type: none"> <li>• Preparation and monitoring of budgets.</li> </ul>	✓	
<ul style="list-style-type: none"> <li>• Preparation of management and statutory accounts, financial accounts and cash flows.</li> </ul>	✓	

<ul style="list-style-type: none"> <li>• Preparation of financial information for Business Plans and other strategic processes.</li> </ul>		✓
<ul style="list-style-type: none"> <li>• Successfully monitoring and reporting organisational performance.</li> </ul>		✓
<ul style="list-style-type: none"> <li>• Risk management and business planning.</li> </ul>		✓
<ul style="list-style-type: none"> <li>• Cost benefit analysis and discounted cash flow methodology.</li> </ul>		✓
<ul style="list-style-type: none"> <li>• Reporting to groups/committees at board level, eg, preparing and presenting papers.</li> </ul>		✓
<ul style="list-style-type: none"> <li>• Long-term financial planning and modelling and Treasury Management.</li> </ul>		✓
<b>Knowledge</b>		
<ul style="list-style-type: none"> <li>• Funding mechanisms, securing long-term funding and financial issues facing social housing.</li> </ul>		✓
<ul style="list-style-type: none"> <li>• Sensitivity analysis and scenario planning.</li> </ul>		✓
<ul style="list-style-type: none"> <li>• Housing Association Accounting.</li> </ul>		✓
<ul style="list-style-type: none"> <li>• Housing Association and Scottish Government funding.</li> </ul>		✓
<b>Other Requirements</b>		
<ul style="list-style-type: none"> <li>• Respect for others and a commitment to equal opportunities.</li> </ul>	✓	

## How we use your personal information:

Orkney Housing Association is known as a “Controller” of the personal data provided to us and is registered with the Office of the Information Commissioner (Z4942508). We take the issue of security and data protection very seriously and strictly adhere to guidelines published in the UK GDPR and Data Protection Act 2018 (the 2018 Act), together with any domestic laws subsequently enacted.

The information we collect from you will primarily be basic personal and contact details required to carry out our major functions as a social housing provider, however there are occasions where we are required to collect data of a more sensitive nature and this will be treated with the appropriate level of confidentiality.

If you have any questions relating to this notice and our privacy practices you should contact our Head of Corporate Governance, who is the central point of contact for GDPR purposes, by email [dataprotection@ohal.org.uk](mailto:dataprotection@ohal.org.uk) or by calling the office on 01856 875253.

## The personal information we may collect about you includes:

- Personal Details: name, addresses and date of birth;
- Contact Details: home phone number, mobile number, and email address;
- Further Details: NI number, gender, ethnicity, disability, age range, signature;
- Employment and Education history;
- Employment Application Details: asylum status, criminal record declaration, potential conflicts of interests, professional qualifications and memberships.

We may also record factual information whenever you contact us or use our services, as well as information about other action we take, so we have a record of what happened.

We will not collect any personal data from you that we do not need.

## We need your personal information to:

- Meet our legal and statutory obligations including information we have to provide to regulators and statutory authorities;
- Reach and communicate a recruitment decision and produce an offer of employment where appropriate.

## Sharing of Your Information:

All personal data we process is processed by our staff in the UK. We sometimes need to share personal information with other organisations, however, where this is necessary we are required to comply with all aspects of the UK GDPR. Even when this is required, we only share data within the UK. We do not give anyone else access to your information in return for payment, for their marketing or commercial purposes.

In the event of an offer being made we will request references from your named referees and will not share your personal information.

We are required to share information with statutory bodies governing finance and housing sectors or for auditing and inspection purposes. However, this will be restricted to the actual information required and will mainly be viewed within the Association’s office, with strict permission set on our electronic file system to ensure use is controlled. We will also encrypt and limit the content of any files that do have to be sent either electronically or otherwise.

## Special Category Data:

There are certain occasions where it will be necessary to perform our functions as a social housing landlord for us to share information containing special categories of data. Currently the only sensitive

information we share is ethnic origin, disability, gender and age range which is reported as a statistical breakdown of job applicants only, not including any actual personal data.

### Third Party Access:

Any 3rd party who the Association gives access to our electronic files is called a Data Processor as they are processing data on our behalf. Although the Data Controller and Data Processor are two separate entities, we are required to ensure all 3rd party access is given in compliance with all UK GDPR principles, and to this affect will have a 3rd party access agreement in place. Only IT maintenance/support contractors, and auditors are given controlled access to our electronic network for reasons of security, maintenance, or any specific purposes outlined in their 3rd party agreement.

### Storage of Your Personal Information:

The Association is committed to holding your personal information securely. This means only those staff that need to see it have access.

Where we store your personal information and can do so solely on computers we will, however there will be cases where we have paper copies instead, or in addition to this. All computers are kept in secure locations and are password protected. Electronic files kept on the shared network accessed by our computers are controlled by strict access permissions so data is only available to those who need to use it. Paper files containing personal or sensitive information are kept in locked drawers, cabinets or rooms. Our computer systems are located at our offices in Victoria Street. We occasionally may use computers or laptops offsite, however these are at all times secure and under our control.

We will keep your personal details for no longer than necessary. Once the information is no longer required for the lawful purpose for which it was obtained it will be destroyed securely.

### Your Rights:

You are entitled to request a copy of any personal data we hold of yours. If any of the information we hold is incorrect you may request to have it corrected or deleted. You have the right to ask us not to process all or part of the personal information we have received, however we may be unable to provide our service to you if we are unable to record and process certain details.

If you wish to complain about how we have handled your data you can contact our Head of Corporate Governance who will investigate the matter on your behalf. If you are not satisfied with our response you may submit a formal complaint to the Information Commissioners Office:

The Information Commissioner's Office  
Wycliffe House  
Water Lane  
Wilmslow  
Cheshire  
SK9 5AF Telephone – 0303 123 1113

Should an offer of employment be made a copy of the Employee Fair Processing Notice will be provided.

# How to apply

To apply for this post, please complete the application form, which can be downloaded from our website, [www.ohal.org.uk](http://www.ohal.org.uk) and return to [recruitment@ohal.org.uk](mailto:recruitment@ohal.org.uk).

For a confidential discussion regarding the role, please contact Craig Spence, Chief Executive, on 01856 875253 ext 701 or email [craig.spence@ohal.org.uk](mailto:craig.spence@ohal.org.uk).

**Closing date for applications is 10.00am on Monday 23 March 2026.**

Following this, shortlisted candidates will be contacted and invited to attend an in-person interview, to be held during the week commencing 30<sup>th</sup> March.

If you are invited to attend an interview, you must provide proof of your eligibility to work in the UK, original qualification certificates and an original document which states your National Insurance number, for example P45, P60 or payslip.

**Equal Opportunities Monitoring:** If you wish to assist us in achieving a diverse workforce, and advertising our vacancies appropriately, please complete the Equal Opportunity Monitoring Form, which can be downloaded from our website, and return to [recruitment@ohal.org.uk](mailto:recruitment@ohal.org.uk). If you do not wish to complete the form, this will have no bearing on any selection decisions.

Thank you and good luck with your application.



*Orkney Housing Association is committed to Equal Opportunities in Employment.  
Scottish Charity No: SC031734*

[www.ohal.org.uk](http://www.ohal.org.uk)