

Job pack – Finance Manager

Thanks for your interest in working with Citizens Advice Rushmoor. This job pack should give you everything you need to know to apply for this role and what it means to work at Citizens Advice.

In this pack you'll find:

- Our values
- 3 things you should know about us
- Overview of Citizens Advice and Citizens Advice Rushmoor
- The role profile and personal specification
- Terms and conditions
- What we give our staff

Want to chat about this role?

If you want to chat about the role further, you can contact Alex Hughes, Chief Officer, by emailing alex.ah@citizensadvicerrushmoor.org.uk or calling 01252 894287

Our values

We're inventive. We're not afraid of trying new things and learn by getting things wrong. We question every idea to make it better and we change when things aren't working.

We're generous. We work together, sharing knowledge and experience to solve problems. We tell it like it is and respect everyone.

We're responsible. We do what we say we'll do and keep our promises. We remember that we work for a charity and use our resources effectively.

3 things you should know about the Citizens Advice Service

1. We're local and we're national. Our national offices, based in 6 locations, provide direct support to us in Citizens Advice Rushmoor – we are one of around 300 independent local Citizens Advice services across England and Wales.

2. We're here for everyone. Our advice helps people solve problems and our advocacy helps fix problems in society. Whatever the problem, we won't turn people away.

3. We're listened to - and we make a difference. Our trusted brand and the quality of our research mean we make a real impact on behalf of the people who rely on us.



How Citizens Advice Rushmoor works

Citizens Advice Rushmoor is a local independent charity, committed to meeting the needs of our diverse community. With over 100 volunteers, and 35 paid staff, we respond to around 9000 unique clients each year, generating over 29,000 different advice issues.

We deliver our service through as many different channels as we can, to make sure we are accessible to everyone – this includes phone, webchat and email, as well as face to face at our main locations in Farnborough and Aldershot, and many other outreach services.

We run lots of different projects, to help meet community needs. These range in size and focus from our large [Pension Wise](#) service – which delivers across Hampshire, West Sussex, Surrey and Berkshire – to our small outreach at the Prospect Estate Big Local in Farnborough.

We have won national awards for our work, including the “Championing Equality” award, for the Nepali language services we deliver. Our highly regarded Heathlands service specialises in delivering casework for clients with severe and enduring mental health illness.

Our Trustee Board takes overall responsibility for our organisational direction and focus. Click here for our [Annual Review](#) – lots of other information is on our website on www.citizensadvicerrushmoor.org.uk

Overview of the national Citizens Advice Service

The Citizens Advice service is made up of the national Citizens Advice charity, and a network of around 300 local Citizens Advice members.

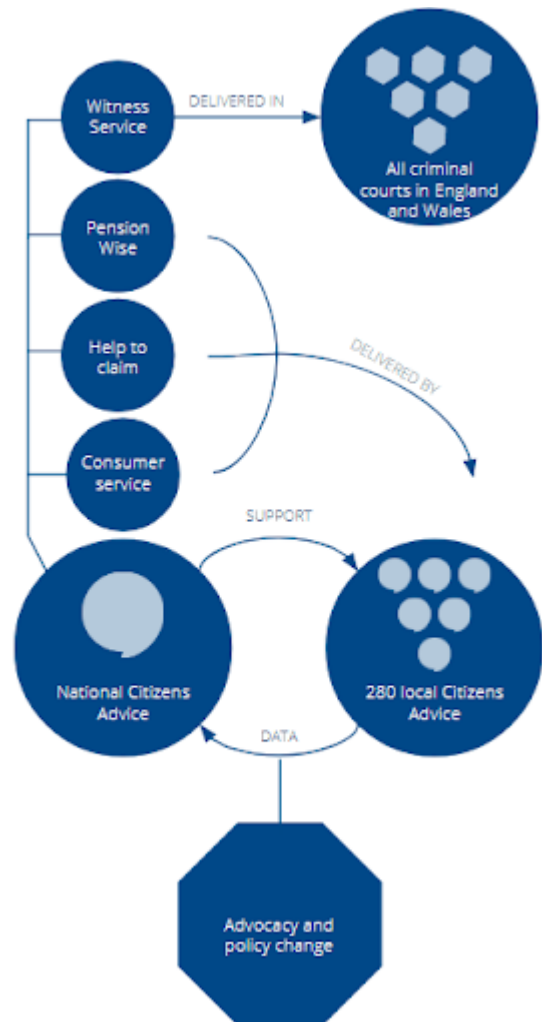
Together, the network of independent charities, delivers services from

- over 600 local Citizens Advice outlets
- over 1,800 community centres, GPs' surgeries and prisons

Nationally this includes

- over 6,500 local staff
- over 23,000 trained volunteers

Our reach means 99% of people in England and Wales can access a local Citizens Advice within a 30 minute drive of where they live.





The role

Following a recent review, the Finance Manager role has recently been upgraded from Finance Officer. This change takes account of our increased turnover, with a wider range of projects and related reporting requirements. As a new role, we are looking for someone who can shape the role, working closely with the Treasurer and Chief Officer, to fit the organisation's needs.

Job Purpose

To manage the effective operation of Citizens Advice Rushmoor's financial and administrative systems, and support the wider team with related issues.



Role profile

1. In conjunction with the Chief Officer and Honorary Treasurer, manage the charity's financial systems to comply with relevant requirements, including:
 - a. Production of monthly and quarterly management accounts to agreed formats
 - b. Management and delivery of monthly payroll in line with contractual obligations
 - c. Recording and managing all financial transactions, using agreed accounting system
 - d. Payment of suppliers and other outgoings, in line with agreed systems
 - e. Production of funder and other finance related reports, using required systems
 - f. Reconciliation of banking and other transactions
2. Provide support for wider office administration, including where appropriate:
 - a. Maintenance of relevant HR information, using agreed system
 - b. Taking a formal supervision role with agreed volunteers
 - c. Supporting others with use of office equipment and systems
 - d. Administrative support for occasional meetings
 - e. Dealing with incoming and outgoing post

- f. Occasional support or cover for reception role
3. Abide by health and safety guidelines, and wider policy compliance across the organisation
4. Undertake appropriate training, and attend internal and external meetings as agreed with the Chief Officer



Person specification

1. **Demonstrably proficient with accounting systems, including payroll (Sage and Sage payroll currently).**
2. **Sound understanding of accountancy principles, preferably demonstrated by a relevant qualification.**
3. **Proficient administration and IT experience, with ability to use Excel and other relevant software to produce clear and understandable reports.**
4. Understanding or experience of charity finance, including restricted / unrestricted funds.
5. Experience of producing management accounts.
6. Understanding and support for the Citizens Advice service aims, principles and policies.
7. Flexibility and willingness to work as part of a team, and support others.
8. Able to organise and process sensitive information effectively, with due regard to confidentiality, Information Assurance and GDPR.
9. Able to monitor and maintain own standards, work on own initiative, prioritise and meet key deadlines.
10. Able to work across the Farnborough/Aldershot area.
11. Able to attend occasional out of hours meetings.
12. Able to communicate clearly verbally and in writing, and to present complex information effectively.

** Items in bold will be given more weight in the recruitment process*



Terms and conditions

Our standard terms and conditions include:

- A standard 37 hour working week, which forms the basis of all pro-rata salary calculations
- 23 days' paid annual leave in each annual leave year, in addition to all normal public and statutory holidays (usually totalling 28 in all) – pro-rated for part time staff
- 5% employer contribution of eligible earnings to People's Pension personal pension scheme – with 5% minimum employee contribution from 1 April 2019
- Enhanced sickness scheme giving 1 month's full pay and 2 months' half pay during the first two years of service; and 2 months' full pay and 2 months' half pay after the 2nd year of service.
- Flexible working and home working where this fits the role requirements and business needs of the charity.



What we give our staff

Our Trustee Board is committed to making Citizens Advice Rushmoor “a great place to work and volunteer”; this objective is reflected in our People Strategy and focused activity to realise this ambition. We value our team and provide an Employee Assistance Scheme for all staff, which includes a 24/7 confidential helpline.

We place a high value on equality, diversity and inclusion; and offer continuing learning and development opportunities to all our staff. Our behaviour framework commits the team to mutual support and wellbeing. Our Trustees take an active interest in health and safety, and the overall wellbeing of the team. Issues or concerns raised by staff are addressed proactively,



How to Apply

Application form

Please complete your application and return it by email (as a Word document) no later than the closing date referred to in the advert. CVs will not be accepted as a substitute for the application form.

It is important that you complete the application form as fully and accurately as possible, ensuring that you give specific examples which demonstrate how you meet the essential and desirable criteria for the role for which you are applying. No assumptions will be made about your achievements and abilities, so it is important to explain these clearly and concisely.

Disability

Please let us know if you require any adjustments to be made to the application process or would like to be taken into account when we are considering your application. Please be assured that we will be supportive in discussing reasonable adjustments at any stage.

Entitlement to work in the UK

A job offer will be subject to confirmation that you are permitted to work in the UK in accordance with the provisions of the Asylum and Immigration Act 1996: evidence of this will be needed, if you are successful and an offer of employment is made.

Diversity Monitoring

Citizens Advice Rushmoor values diversity and promotes equality. Monitoring recruitment and selection procedures is one way of helping us to ensure that there is no unfair discrimination in the way that we recruit people. The diversity profile of people who apply for posts at Citizens Advice Rushmoor is given in confidence for monitoring purposes only and does not influence any recruitment decisions. If you would prefer not to answer any of the questions we ask, please leave them blank.

Shortlisting outcomes

Shortlisted applicants will be invited for an interview. Interviews may include a practical task or assessment, with all details provided before the interview.

References

All job offers are subject to the receipt of two satisfactory references: One should

be from your current or most recent employer or line manager (if you are employed through an agency), or your course tutor if you have just left full time education. The other should be someone who knows you in a work related, voluntary or academic capacity. Both referees should be able to comment on your suitability for the role. References will only be taken up for successful candidates following interview.

Criminal convictions

Anyone who applies to work within Citizens Advice Rushmoor will be asked to disclose details of unspent convictions during the recruitment process.

Having a criminal record will not necessarily bar you from working for Citizens Advice Rushmoor – much will depend on the type of job you have applied for and the background and circumstances of your offence. However, we are not able to employ anyone with a conviction for a sexual offence against a child or vulnerable adult, regardless of when the offence took place. All other convictions will be considered on an individual basis.

Disclosure and Barring Service (DBS) disclosures are only requested where proportionate and relevant to the post concerned. If the post for which you are applying for requires a DBS disclosure, this will be noted in the application pack.