



Local Finance Consultant

Thanks for your interest in working at Citizens Advice. This document should give you everything you need to know about the above role.

Want to chat about this role?

Please contact the recruitment team at careers@citizensadvice.org.uk



The team

The role you're applying for is in the Finance & Corporate Governance directorate and in the Local Finance team who work with local Citizens Advice offices across England & Wales.

- Citizens Advice Careers Site - <https://www.citizensadvice.org.uk/about-us/job-and-voluntary-opportunities/citizens-advice-job-opportunities/>
- Citizens Advice LinkedIn - <https://www.linkedin.com/company/citizens-advice/life/10eff46c-fc7c-445c-a04b-b63063a2e3bf/?viewAsMember=true>
- Citizens Advice - <https://www.citizensadvice.org.uk/>



The role

This is an exciting opportunity to take forward the Local Finance Support service offer in meeting the mission based strategy objectives, and to meet the financial support needs of the Citizens Advice Network in challenging times.

We are looking for energetic and experienced Finance consultants who can ensure we deliver a consistent and high quality service. The role will include helping local offices to manage their finances efficiently and effectively by offering an expert consultancy and financial management service, and to support them in addressing financial challenges ahead, which may include merger and restructuring support.



Role profile

Band:	Manager-Lower	
Reporting to:	Senior Local Finance Consultant	
Proficient salary:	£49,479 (plus London weighting if applicable)	
Location:	Blended between office and home (England and Wales)	Travel H/M/L: L
Team overview:	Support local Citizens Advice to make best use of their finances and improve the financial health of the network making us stronger & more effective	
Role purpose:	<ul style="list-style-type: none">• To help local offices improve their financial management processes and reporting• To help Trustee Boards make informed decisions in a challenging financial environment to ensure ongoing sustainability of network• To contribute to the development of and deliver local Citizens Advice financial support initiatives to develop financial best practice throughout the service.• To develop and provide high level professional financial consultancy and advice to local Citizens Advice offices	

Key accountabilities	Key elements/Tasks	% of Time
<p>Plan and deliver the overarching strategy/ business plan initiative</p>	<p>To help local offices improve their financial management processes and reporting. This will include</p> <ul style="list-style-type: none"> ● Providing ongoing support to local Citizens Advice on implementing standardised financial systems and processes that have been developed for the network. Ensure regular engagement with Local offices to inform the development of the systems ● Input into the design and costing of national funded services delivered by local Citizens Advice in collaboration with the Bidding and National teams. Support the local offices in their financial reporting to these programmes. ● Monitor and ensure improving standards and compliance with Charity Commission, Citizens Advice and FRC report requirements <p>Develop the Financial Health Reporting Strategy, engaging with key stakeholders to inform the development</p> <ul style="list-style-type: none"> ● Ensure ongoing maintenance of the aggregation of financial data across the whole network and the system of monitoring compliance with the membership scheme. ● Use the network sustainability risk analysis to identify support requirements. ● Provide regular monitoring reports on financial / management data and reports to key Citizens Advice stakeholders to inform future priorities for financial and other support. ● Contribute to the evaluation of the Local Finance Support service and implement lessons learned in future work. <p>Develop and deliver the support strategy on key financial risks to the service,</p> <ul style="list-style-type: none"> ● such as Tax or Pensions liabilities, and engage with key stakeholders, and develop the communications strategy to inform all interested parties. 	<p>35</p>
<p>Specialist Consultancy</p>	<p>Provide professional finance consultancy at a high level, recognised within the Charity sector to assigned local Citizens Advice offices, predominantly</p>	<p>20</p>

	<p>online and by telephone or email, and occasionally face-to-face. This will cover all aspects of</p> <ul style="list-style-type: none"> ● Financial strategic consulting ● Process consulting ● Service development consulting and ● Service provision consulting <p>Contribute financial expertise to support more complex Strategic change interventions, working with colleagues as part of a project team, such as changes to legal structures, or addressing financial difficulties.</p> <p>Monitor compliance, providing specialist consultancy support to assist in the management of change including dealing with crisis management and negotiating effectively with stakeholders.</p> <p>Provide guidance to local Citizens Advice on a range of technical financial issues relating to new and ending funding streams.</p> <p>Hold a positive and open relationship with CEO's, Finance Officers, Chairs and Treasurers. Use knowledge of Local offices to facilitate the early identification of problems and develop action plans to solve them.</p> <p>Support local Trustees to recruit and induct finance officers and Treasurers</p>	
<p>Build service wide capability - by developing and implementing best practice systems and processes</p>	<p>Build the capacity of the Local network:-</p> <ul style="list-style-type: none"> ● In keeping up to date on best practice systems and processes in financial management to ensure that the Local Citizens Advice offices are meeting their statutory obligations, and good practice and ● Implementing best practice systems and processes across the service. <p>Develop new initiatives and innovations that have long-term implications that reduce costs without reducing service to the client.</p> <p>Develop best practice in financial management throughout the service by:</p> <ul style="list-style-type: none"> ● Keeping abreast of developments in financial management, particularly as they relate to the charity sector; ● Contributing written guidance on financial management practices, though though 	<p>15</p>

	<p>Intranet, Workplace, Skillbook and other channels</p> <ul style="list-style-type: none"> • Organising and leading events aimed at facilitating the sharing of ideas and best practice among local Citizens Advice; • Developing and delivering national and local training programmes including at Chair and CEO level aimed at improving governance and financial management skills in local Citizens Advice; <p>Provide guidance and training to Operations teams in financial management and reporting systems, including to support any new guidance issued on the intranet or local office portal.</p>	
<p>Leadership and influence</p>	<p>Advise the Citizens Advice service on financial matters and influence financial management practices of Trustees and leaders within the network.</p> <p>Influence and negotiate the policies and processes of funders and regulators outside the national and local organisation in respect of financial management and governance.</p> <p>Lead and influence where there is no direct control in demanding situations, for example in circumstances resulting from viability issues, impact on staff, difficult regulatory issues, difficult relationships with partners, external stakeholders, media with potential reputational impact</p>	<p>5</p>
<p>Maintain and develop expertise and insight</p>	<p>Proactive in identifying external and internal contacts within charity finance.</p> <p>Advise Local Citizens Advice managers and Trustees on recent developments in field of work.</p> <p>Design and introduce financial management processes, making innovative choices that improve systems, rules and procedures beyond existing practices</p> <p>Undertake research and analysis in field of work.</p> <p>Develop and maintain positive working relationship with a range of stakeholders and specialist advisers as directed by the Head of Local Finance in line with the Business Plan, with a view to providing high quality professional support to local Citizens Advice in financial difficulty.</p>	<p>10</p>

	<p>Provide financial support to local Citizens Advice at risk of insolvency, and liaise with the Insolvency Practitioner on financial matters.</p> <p>Assist local Citizens Advice staff and colleagues in negotiations with local authorities and other funders / potential funders, and Local Government Pension Fund representatives.</p>	
Contribute to team development	<p>Be an active member of the team, identifying opportunities for your own development.</p> <p>Contribute to the good and efficient working of the team in delivering against the Business Plan.</p> <p>Coaching and/or buddying members of the team where required.</p> <p>Contribute to the team in a positive way by</p> <ul style="list-style-type: none"> ● Creating a positive working environment in which equality and diversity are respected and staff can do their best ● Managing deadlines and supporting colleagues as appropriate ● Positively engaging with regular supervision sessions and the talent talk process ● Supporting the induction of new staff ● Ensure that the work of the Local Finance Team reflects and supports the service's Equality and Diversity Strategy. ● Compliance with Citizens Advice policies and procedures, including Health and Safety. ● Implementing agreed systems, procedures, monitoring and evaluation to ensure consistency in level and quality of support provided by Local Finance Consultants to local Citizens Advice 	10
Other	<p>Monitor and interrogate spend on Local Finance projects/day to day activities. Ensure appropriate cost allocation processes are in place</p> <p>Challenge financial efficiency and value for money throughout work with Local offices.</p>	5

	<p>Contribute flexibly to the work of the Operations and Finance Directorates and the wider organisation, to assist in the provision of an effective service to local Citizens Advice offices.</p> <p>Undertake any other duties as may be reasonably required within the scope of the role.</p>	
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Person specification

ESSENTIAL CRITERIA

1. Qualified professionally / academically in financial / management accounting (or equivalent experience).
2. Proven ability in a senior management or finance consultancy role, or other role providing professional business services.
3. High level Excel (including pivot tables and macros) and financial modelling skills, and highly proficient in other IT packages. High level competence in the use and development of PC based accounting packages (ideally QuickBooks)
4. Proven ability in running financial accounting, year end closure and management reporting processes in both small and medium sized organisations (up to £5m turnover), and sound knowledge of Standard Accounting Practices, of Charities Act, Companies Act and SORP requirements.
5. Excellent interpersonal skills with the personal presence and ability to establish credibility, command respect and develop positive relationships with a diverse customer base and the ability to influence, network and negotiate effectively with a range of senior internal and external stakeholders
6. Confident verbal, written and presentation skills; including the ability to produce user-friendly guidance materials for a range of audiences, and to deliver training in finance to people without a finance background.
7. Highly resilient, with strong analytical skills and proven ability to solve problems creatively, identifying and implementing solutions to non compliance and to manage the consistent assessment of risk.

8. Ability to work within a target driven environment, managing own and team workload effectively and realistically, and achieving results within agreed deadlines.
9. Ability to work as part of a team and with other teams, developing common standards, policies and practices and have a collaborative approach to seeking solutions.

DESIRABLE

10. Understanding of the environment in which Citizens Advice local Citizens Advice operate including knowledge of the voluntary, statutory and private sector.
 1. Experience of Google Workspace and connected tools would be beneficial in day to day operations.

Requirements for role (candidates will confirm at interview)

1. Ability to contribute to an inventive, responsible and generous organisation/team culture
2. Understanding of, and commitment to, the aims and principles of the CAB Service in which equality and diversity is embedded throughout.
3. Awareness that Citizens Advice clients are at the heart of everything we do.