

Person Specification – Finance Manager

Essential and desirable skills, abilities, experience, knowledge and special requirements for the post of Home-Start South Leicestershire Finance Manager

This form also indicates how the different requirements may be assessed during the selection process:

A = Application; I = Formal Interview; T = Interview Task.

ESSENTIAL	Assessed by:		
	A	I	T
Education and qualifications			
Good standard of education (Degree or equivalent vocational level qualification)	√		
Employment history			
Relevant previous or current employment in a finance function at bookkeeping level or above in any sector, but preferably the charitable sector	√		
Skills and experience			
Experience of analysing and creating realistic budgets and financial forecasts on a full cost recovery basis for ongoing or newly planned projects/services and business scenario modelling	√	√	√
Experience of maintaining accurate and timely records of all charity income and expenditure on an accruals basis, with experience of electronic systems (we use Sage and Quickbooks), conducting monthly bank account reconciliations	√	√	
Experience of correctly allocating a variety of costs across multiple different income sources and producing funder/project specific financial reports as required by the Charity Manager	√	√	
Ability to manage the cash flow of the organisation, ensuring enough cash is available to pay suppliers and staff on a timely basis and also manage the investments in interest bearing bank accounts	√	√	
Ability to manage a payroll system for a small staff team including making real time submissions to HMRC, payrolling expenses or benefits, managing sick/maternity pay etc. and administration of pension file uploads	√	√	
Ability to produce quarterly management accounts for the Board of Trustees, and prepare all accounts records in the relevant charitable format for annual Independent Examination, liaising with external accountants/auditors	√	√	
Ability to accurately provide staff/Trustees with information on available budgets for planned/proposed expenditure, with proactive advance	√	√	√

Home-Start is committed to safer recruitment practice as an important part of safeguarding and protecting children and vulnerable adults

notification of any under/over spend positions, and financial risks and viability			
Understanding of the rules, regulations, legislation and processes that result in efficient and compliant management accounting	√	√	
Proficient at using Microsoft Office programs especially Excel and Word, and confident in accessing information through the internet, conducting on-line banking, and using on-line forms (e.g. HMRC)	√	√	√
Personal attributes			
Ability to work highly independently within the role, maintaining significant responsibility for the smooth running of all the charity's finance functions	√	√	
Ability to maintain excellent communications within a small charity management and delivery team, particularly working closely with the Charity Manager	√	√	
Ability to work in a highly accurate and interrogative manner – always looking to make real sense of the numbers	√	√	
Ability to work flexibly to respond to new requirements and tight timescales on occasion	√	√	
Commitment to the principles and ethos of the charity especially in terms of equality of opportunity/anti-discriminatory practice and children's safeguarding	√	√	
Understanding of the need for professional confidentiality and Data Protection in relation to information on finances, funding, staff and charity beneficiaries	√	√	
Commitment to upholding the charity's ethical and environmental policies in all finance functions as well as in the services/institutions engaged to support the charity.	√	√	
Special Requirements			
Eligible to work in the UK	√	√	
Occasional evening or weekend work to meet deadlines	√		
A commitment to ongoing professional learning and development	√		
DESIRABLE			
An Accountancy Qualification (ideally CIMA but also ACCA or AAT) or appropriate professional membership status (e.g. CPAA) achieved via QBE (Qualified by Experience)	√		
Training/qualifications/ relating to financial management/business management	√		
Experience or knowledge of charity accounting regulations	√	√	
Experience of working within a small voluntary organisation, especially in a financial support role	√	√	
Experience of creating financial risk assessments	√	√	

Home-Start is committed to safer recruitment practice as an important part of safeguarding and protecting children and vulnerable adults

Home-Start is committed to safer recruitment practice as an important part of safeguarding and protecting children and vulnerable adults

Version August 2026