



Job Description and Person Specification

Finance Officer

Salary: £29,000 FTE

Location: Remote

Contract type: Permanent

Hours per week: 21 hours (3 days/60% FTE)

Notice Period: 6 weeks

Probation Period: 3 months

Staff Benefits:

- 27 days (FTE) annual leave plus statutory bank holidays
- Support to develop your own personal development plan and goals, identify your strengths and motivations
- Access to training budget
- Enhanced sickness and parental leave policies
- NEST pension scheme
- Quarterly away days and staff social events
- Employee Assistance Programme (confidential counselling helpline)
- Reward Gateway discount scheme and financial/health advice
- Life Insurance coverage
- Highly flexible working environment
- Friendly, supportive team
- Living Wage and Disability Confident employer

As part of our new strategy, a proposal to increase staff benefits beyond the above is currently under consideration by our board and is likely to be implemented before the post-holder begins.

Job Purpose:

This role will play a key part in ensuring the smooth running of the financial processes of the charity, ensuring that robust procedures, effective digital systems and collaborative teamworking are in use.

This is a multi-faceted role, with opportunity to grow and develop. You'll work with colleagues across the organisation. Our organisation has an exciting and ambitious new strategy, and we're looking forward to welcoming you to our friendly and collaborative team!

This role will be supported internally by a coach who will support this individual's learning and development, as well as an external accountancy support service, who will provide

senior accountancy advice and mentoring. There is scope for this individual to take on more advanced finance tasks in future, should the individual desire to develop in the role.

Key responsibilities:

- To maintain accurate and up to date financial accounting procedures and records for the organisation
 - o To maintain accurate ledgers, including calculating and posting monthly journals and ensuring that accruals, prepayments, payroll, depreciation, recharges, investments, allocations and reconciliations are done accurately in Xero
 - o To prepare cash flow forecasting reports and oversee the movement of assets between our bank accounts and investment funds
 - o To monitor our investment funds and oversee the movement of funds within our investment fund and between our bank account and investment fund
 - o To complete monthly checks to ensure our monthly payroll is accurate and payroll matters are accurately recorded and payroll processed is accurate and in line with contracts, payroll records and legislative requirements
 - o To archive financial records, ensuring none are kept longer than needed, but all are kept for as long as needed
- To provide oversight ensuring effective banking controls are in place
 - o To carry out bank reconciliations for all income and expenditure
 - o To provide training and support to team members across the organisation on the use of our purchase authorisation and expenses procedures
- To improve and streamline our financial processes and procedures
 - o To maintain up to date financial policies for the organisation, in collaboration with the Finance Committee, and to ensure these are followed across the organisation
 - o Maintain clear and up to date procedure notes for all areas of responsibility
 - o To play an active role in finance committee meetings, particularly in relation to financial policies, investment funds and cash flow
 - o Assist to identify and update information and records during quarterly management accounts preparation and the annual Audit/Independent Examination
- To provide support to the Finance Administrator and wider team in support of the smooth running of our organisation's financial functions
 - o Championing the use of digital tools, troubleshooting and explaining
 - o Provide coaching support to the Finance Administrator and other colleagues in the organisation

- Providing/supporting the delivery of training to team members, with the support of the Finance Administrator and external accountancy service
 - Supporting budget holders in project teams to develop and monitor project budgets, providing in house training and basic support
 - Supporting colleagues preparing new project budgets
- Overall
- Take ownership of personal workload
 - Set and work towards development goals
 - Maintain excellent records
 - Work collaboratively with colleagues across the organisation and externally
 - Embrace and champion digital systems including Xero and add-ons, ClickUp, Timetastic and others
 - Support the implementation of our efforts to improve the efficiency of our operating model by setting and working to targets and benchmarks, and aligning activities to meet or exceed these
 - Play and active role in one or more project teams

This job description is indicative of the range of current duties and responsibilities for the post, it is not comprehensive. It is inevitable that the duties will change to reflect organisational change and it is essential therefore that it is regarded with a degree of flexibility, so that changing needs and circumstances can be met. All changes will be discussed with the post holder.

Who are we looking for?

The below is a summary of who we're looking to find, ideally. We recognise the best candidate is probably someone with most of this, but not all, and a heap of other useful things we forgot to list below. Please use your cover letter to outline how your experience, skills and attributes compare to the list below – and add in anything else you think would be useful for the role.

Qualifications:

- Part or full finance qualification with a UK-based recognisable accountable body or qualified by demonstrable in-depth experience

Experience and Knowledge:

- Practical financial accounting experience, ideally in a UK charity environment, including journals, cash flow forecasting, bank reconciliations, monitoring investment funds, budget preparation and reporting
- Understanding and experience of Xero and associated plug-ins (or equivalent systems and ability to pick up new systems quickly)
- Passionate about effective and efficient processes, keen to improve processes through digitisation and automation
- IT literate including Excel and databases
- Detail-oriented, with numerical and clerical accuracy
- Ability to maintain up-to-date financial policies, ensuring compliance with English charity law
- Ability to explain financial terminology, processes and digital tools to non-finance experts in a friendly and supportive way
- Experience and/or interest coaching (or managing with a coaching style)
- Desire to work in a purpose-driven organisation in support of local communities

Skills and Strengths

- Detail-oriented
- Adherence to rules, regulations
- Supporting the development of others
- Enjoys finding better ways to do things, problem solving
- Digitally savvy
- Explaining finance to non-technical audiences