

# Financial Accountant

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## Oxfordshire Community Foundation

Oxfordshire Community Foundation (OCF) is a charity that builds thriving communities through effective philanthropy, matching investment to the needs of small charitable groups. We fund around 200 grassroots organisations each year, giving around £2m annually to tackle priority issues. These organisations offer excellent value for money, but often go under the radar of funders because they are too small to afford comms and fundraising.

In November 2023 we published the second edition of [Oxfordshire Uncovered](#), our flagship report that sets out priority need areas for Oxfordshire over the coming years. Our county's wealth, success and beauty hide a number of serious and shocking social problems, including poverty, poor education and health, crime, and homelessness. The pandemic and the current huge increases in the cost of living have made these issues worse, while the climate crisis is becoming ever more urgent.

We recently received an 'A' rating in an independent assessment of transparency, accountability and diversity by the [Foundation Practice Rating](#) and we are an accredited member of [UK Community Foundations](#), a network of foundations across the UK. We work with philanthropists, businesses and the public sector, pooling their funds so that they can make a bigger difference together.

We are a small, friendly team. OCF is committed to creating an inclusive working environment where everyone can flourish whilst contributing to our mission. We warmly welcome applicants from across the rich diversity of Oxfordshire and we are happy to consider flexible working. We are proud to be an official [Oxford Living Wage](#) employer.

## The role

The Financial Accountant will report to the CEO and be part of our small management team. They will oversee our finances as we seek to scale up our grant-making while maintaining our high-quality assurance processes. They will also be responsible for providing scrutiny and a strategic eye to the management of our endowment. A small but important element of the role will be oversight of OCF's cybersecurity. The successful candidate will combine a rigorous eye for technical detail with long-term thinking and a passion for our mission.

**Accountable to:** CEO

**Key relationships:** Treasurer, Chair of Finance Committee, Chair of Trustees, staff team and trustees and OCF fundholders.

**Salary:** £55,000 (full time equivalent) subject to negotiation for the right candidate.

**Hours:** 0.6 FTE (21 hours a week, which can be spread flexibly across the week)

**Type of contract:** Permanent.

**Other benefits:** 3% pension (increasing to 5% after five years). 25 days holiday plus Bank Holidays (FTE); additional paid leave for Christmas week office closure; 5 paid volunteering days (FTE).

**Place of work:** OCF office at 3 Woodins Way, Oxford (less than 10 minutes' walk from Oxford bus and rail stations) with hybrid working options. Parking permits available.

**Preferred start date:** as soon as possible

## Responsibilities

- Accountable for producing the Annual Report and Financial Statements in accordance with the Charity SORP, and being primary contact for the auditors.
- Preparation of annual budget and forecast, quarterly financial reports and monthly management accounts and updated forecasts.
- Maintain the detailed records of the endowment and restricted funds on a monthly basis. Oversee accurate statements for fundholders and provide ad hoc reports and analysis as required.
- Responsible for maintaining strong financial systems to provide accurate financial records and control systems for OCF, working closely with the Development and Grants teams to ensure complete alignment between internal systems (eg SAGE and Salesforce).
- Responsible for ensuring the Finance Committee is effectively supported, including: agenda and minutes, the production of timely reports, following up on actions and ensuring compliance with Charity Commission, HMRC Gift Aid and other reporting requirements.
- Liaise with OCF's Investment Fund Managers (currently CCLA and Brompton Asset Management) and work with the Finance Committee to ensure performance is maximised.
- Monitor cash balances and ensure OCF is getting value for money on its cash.
- Management and development of a Finance Officer
- Oversight of effective delivery of all financial transactions, bank accounts, cash flow, bank reconciliations and staff payroll; potential to manage the administration of grants as our structure evolves.
- Bring to the early attention of the CEO and Chair of Finance Committee any matters of concern and risk in relation to the finances of OCF, and provide financial advice on mitigating actions.
- Maintain cybersecurity and insurance to meet operational requirements, and provide oversight to ensure OCF contracts are value for money.

## Key competencies



- ACCA/ACA/CIMA qualified and membership of one of the major UK accountancy bodies
- Experience of charity accounting and knowledge of best practice
- A proven track record of financial management in a an organisation with significant turnover understanding of restricted spend-down funds and endowments
- Experience in accounting software – preferably SAGE – with good computer literacy, including MS Excel and ideally CRM systems such as Salesforce
- Ability to think strategically in financial matters and identify areas of risk and opportunity, and to implement improvements working with colleagues.
- Good communication skills, particularly with the ability to explain financial data to a generalist audience of senior decision-makers.
- Commitment to the [mission and values](#) of the Oxfordshire Community Foundation
- Commitment to developing staff, preferably with line management experience.
- Willingness to undertake occasional planned evening duties, such as quarterly Finance Committee and Board meetings.

### Application Process

To apply, please submit a curriculum vitae and one-page cover letter.

**Closing date 9 June 2024.**

**Interviews will be held 18 – 21 June.** These will consist of a presentation task and in-person interview at our office.

To find out more about our work, visit <https://oxfordshire.org/>.

For any queries about the role, please contact [zoe.sprigings@oxfordshire.org](mailto:zoe.sprigings@oxfordshire.org). Please let us know through the email above if you have a disability and require any reasonable adjustments to the interview process. We are proud to have disabled staff and are fully committed to providing adjustments.

