

# Finance Manager

## Job pack

Thanks for your interest in working at Citizens Advice South West Surrey. 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 South West Surrey
- The role profile and personal specification

### **Want to chat about this role?**

If you want to chat about the role further, you can contact Becky Jeffrey ([becky.jeffrey@casws.org.uk](mailto:becky.jeffrey@casws.org.uk))

# 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 us

**1. We're local and we're national.** We have 6 national offices and offer direct support to people in 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.

# Citizens Advice South West Surrey

Citizens Advice South West Surrey covers the areas of Waverley and Guildford Boroughs. Both borough areas are often considered to be affluent with high levels of employment and rates of home ownership. However, there are significant pockets of deprivation. We're an independent local charity and limited company supporting some of the most vulnerable in our community.

We have 6 offices, in Ash, Cranleigh, Farnham, Godalming, Guildford and Haslemere, as well as delivering services at outreach in communities. We provide free, confidential, impartial and independent information, advice, casework and support for the benefit of the local community, as well as using our unique evidence based approach to exercise a responsible influence on policy and practice to address the underlying cause of problems for our clients.

Governed by a board of 8 trustees, we have a highly skilled workforce to support the organisation. This includes 38 staff and 145 volunteers.

We provide a generalist advice service through which the public can access advice from Monday to Friday through email, in person and over the telephone. Our core funding is primarily provided by Guildford Borough Council, Waverley Borough Councils and the Town and Parish Councils across Waverley, with additional support from donations.

In addition to our generalist advice service, we run 6 targeted and specialist services.

- **Cancer service** is funded by Macmillan Support and provides welfare benefit advice to people in Guildford, Waverley and Surrey Heath who are affected by cancer and is a largely telephone-based service. We also have an outreach service funded by and operating from the Fountain Centre for those being treated at Royal Surrey Hospital.
- **Mental Health service** provides a casework service (predominantly welfare benefits, debt and housing) to people with mental health issues. The service is currently available for people under secondary mental health care and is funded by the Surrey Heartlands Integrated Care Board, and Guildford and Waverley Alliance.
- **No-one Left Behind** is focused on community money advice, advice in communities and reducing poverty, funded by Surrey County Council, as part

of their priority that no-one is left behind. It is run in collaboration with local Citizens Advice across Surrey.

- **Specialist Debt advice** - this includes advice to some of the most financially excluded groups in society funded by the Money and Pensions Service (MaPS).
- **Homelessness Prevention** is funded by Guildford Borough Council and is designed to support people who are at risk of homelessness by supporting them with debt, benefits and housing issues.
- **Community Engagement** is funded by Waverley Borough Council and Community Foundation for Surrey to provide those residents with the highest level of deprivation in Waverley the opportunity to improve their own life chances by bringing together partners to develop tools, community action and advice.

# Overview of Citizens Advice

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

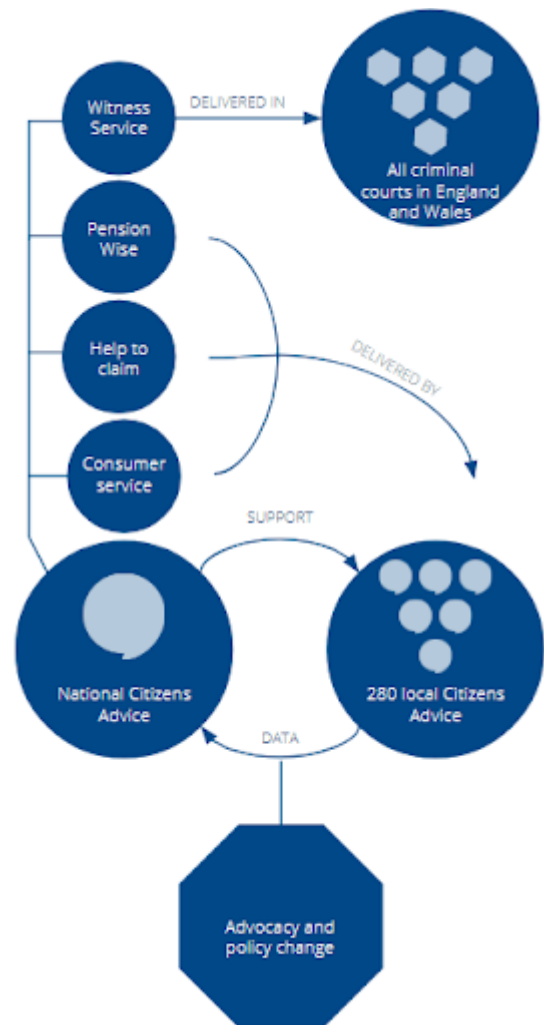
This role sits our network of independent charities, delivering services from

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

They do this with:

- 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

**30 – 37 hours a week**

**£29,983.59 - £33,315.10 FTE**

**Permanent**

Are you a finance professional looking to make a meaningful impact? There's never been a more important time to work for Citizens Advice. With the soaring cost of living, people and families are struggling to make ends meet, leading to record-breaking demand for our services. We're excited to announce a new opportunity for a Finance Manager to join our team, playing a crucial role in supporting both the operational and strategic financial management of our organization. Your work will ensure we can continue to deliver our vital services efficiently and sustainably during this critical time.

As the Finance Manager, you will oversee the day-to-day financial operations, including budgeting, financial reporting, and compliance, while also providing strategic insights to guide Citizens Advice's long-term financial planning. This is a unique opportunity to shape the financial direction of a growing organization that is on the frontline of supporting those most affected by the cost-of-living crisis. Working closely with the senior leadership team, you'll help develop and implement strategies that enhance our impact, manage resources effectively, and ensure transparency and accountability in all financial matters.

We're looking for someone with a strong background in finance, ideally within the charity or non-profit sector, who is passionate about making a difference. If you have the skills to manage both the operational details and the big-picture financial strategy, we want to hear from you. Join us at Citizens Advice and play a vital role in helping people find a way forward and tackling the root causes of the challenges they face.

**Deadline for this role is 9am Monday 2 September 2024**

**The Citizens Advice service values diversity, promotes equality and challenges discrimination. We encourage and welcome applications from people of all backgrounds. We particularly welcome applications from disabled and Black, Asian and Minority Ethnic people, as they are currently underrepresented in our workforce.**



# Role profile

<b>Role</b>	<b>Finance Manager</b>	
<b>Job family</b>	Support services	
<b>Reporting to</b>	Chief Officer	
<b>Salary / Grade</b>	£29,983.59 - £33,315.10 FTE	
<b>Hours</b>	30 - 37 hours per week	
<b>Location</b>	Godalming, Guildford, and Farnham with travel to other CASWS locations as required. Flexibility for some remote working dependent on service need as agreed between teams	<b>Level of travel:</b> Medium
<b>Team overview</b>	The CASWS support services made up of all the support functions required for the successful delivery of our services. Those services range from HR and Finance, through to IT support and Health and Safety.	
<b>Role purpose</b>	To ensure that accurate and timely financial information is produced for the Chief Officer, other department managers and board of Trustees. Providing a full financial management service to ensure CASWS operates effectively. and is compliant with all legal and sector requirements.  <i>Please note, this role will support more than one charity and set of accounts</i>	
<b>Functional responsibilities /competencies</b>	<b>Key elements/Tasks</b>	<b>% of Time</b>
<b>Financial management and governance</b> - ensure effective management of key finance governance to comply with charity, company and Citizens Advice	<ul style="list-style-type: none"><li>Ensure proper financial management in compliance with internal procedures, legal requirements and Citizens Advice membership requirements, supported by the Treasurer and CEO including:<ul style="list-style-type: none"><li>Regularly review and recommend improvement/update of financial procedures manual</li></ul></li></ul>	<b>55%</b>

<p>requirements, and to develop our service</p>	<ul style="list-style-type: none"> <li>• Collating information to report on the effectiveness of financial controls</li> <li>• Regularly review and recommend improvement/update of internal financial controls <ul style="list-style-type: none"> <li>• implementing change as agreed</li> </ul> </li> <li>• Ensure accurate financial records and accounts are maintained and performance monitored against agreed budgets, including producing regular updated forecasts of expected out-turn position</li> <li>• Ensure banking, insurance arrangements, salary payments and service agreements are maintained.</li> <li>• Prepare management accounts and other finance related papers to be reported to the Trustee Board on a regular basis.</li> <li>• Carry out monthly meetings with the CEO and other senior managers to explain the current state of play, including explaining financial data to non-finance people</li> <li>• Provide financial information and reports to support funding applications and contract requirements, including development of budgets and input into the development of full cost recovery on projects</li> <li>• Lead on the preparation of statutory accounts in conjunction with the CEO, the Treasurer and Auditors. Including: <ul style="list-style-type: none"> <li>• prepare draft statutory accounts for year-end audit (compliant with the Charity SORP)</li> <li>• prepare notes to the accounts and financial sections in the trustees annual report</li> <li>• liaise with external auditors as required.</li> </ul> </li> <li>• Take the lead on the annual budgeting process</li> </ul>	
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<p><b>Financial Administration and bookkeeping</b> - ensure effective management and administration of key finance related tasks</p>	<p>Supported by our Support Services Assistant:</p> <ul style="list-style-type: none"> <li>• Identify opportunities to claim Gift Aid and to complete Gift Aid Returns to HMRC</li> <li>• Ensure the payment of invoices, receipts, expenses and petty cash and that associated records are maintained.</li> <li>• Manage accounts payable and accounts receivable processes.</li> <li>• Update accounting software (currently QuickBooks) with day-to-day finance transactions on a full accruals basis.</li> <li>• Reconcile petty cash expenditure</li> <li>• Liaising with supplier/funders to resolve queries e.g. late payments</li> <li>• Carry out bank reconciliations</li> <li>• Carry out salary apportionments including liaising with any payroll or pension provider</li> <li>• Carry out monthly apportionment of shared overheads</li> </ul>	<p><b>40%</b></p>

	<ul style="list-style-type: none"> <li>• Bank incoming payments including cash and cheque donations.</li> </ul>	
<p><b>Other duties and responsibilities</b></p>	<ul style="list-style-type: none"> <li>• Line-manage any volunteers working in the finance department.</li> <li>• Abide by health and safety guidelines and share responsibility for own safety and that of colleagues</li> <li>• Be at all times a positive ambassador for CASWS</li> <li>• Participate positively and pro-actively in supervision sessions, team meetings and organisational-wide activities</li> <li>• Ensure that work undertaken reflects and supports the Citizens Advice service’s equality and diversity strategy</li> <li>• Ensure all GDPR and data protection requirements are adhered to in all work for which the post is responsible</li> <li>• Any other relevant duties required to ensure the smooth running of the organisation</li> </ul>	<p><b>5%</b></p>



# Person specification

## Essential criteria

1. Recognised qualification in Accountancy
2. Recent and ongoing experience of providing a full financial management service in a charity or similar organisation, with experience of meeting deadlines and setting priorities
3. Experience of using QuickBooks or similar accounting package and Microsoft Excel spreadsheets
4. Experience of development and maintenance of accounting processes
5. Recent and ongoing experience of drafting management information, and meaningful reporting of variances to Treasurer/Trustee Board
6. Recent and ongoing experience of budgeting, particularly project-by-project and contributing to the budgeting processes across the organisation.
7. Strong analytical skills and an ability to input and interpret complex data using IT system
8. Strong communication skills both orally and in writing
9. Self-reliant and able to problem solve independently
10. Ability to prioritise workload
11. Strong understanding of confidentiality and data protection principles.
12. The ability to commit to, and work within, the aims, principles and policies of the Citizens Advice service

## Requirements for role

1. Work within our organisational key principles - *you are able to work within our key principles to deliver a service that is Confidential, Free, Impartial and Independent.*
2. Embed Equity, Diversity and Inclusion (EDI) in day to day work- *You understand the policies and approach to Equity, Diversity and Inclusion, and are able to use this knowledge to create and support an equitable, diverse and inclusive service and office.*
3. Provide a service that meets legal and regulatory requirements and understand the purpose of quality assurance systems - *You understand the legal and regulatory requirements that apply to your role and know what to do to ensure they're met.*
4. Use systems relevant to the role - *You have the digital skills needed to use the tools, software and platforms relevant to your role.*
5. Describe the range of services provided across the organisation - *You understand that Citizens Advice services are national and local, across England and Wales, and know what the different parts of the service do, both in your office and wider organisation.*
6. Be collaborative, supportive, inclusive and have integrity - *You contribute towards a safe, positive and inclusive working environment where everyone can be themselves.*
7. Work constructively with others, individual and as teams - *You are able to work by yourself, with others and in teams, effectively, productively and constructively.*
8. Personal Development - *You contribute proactively to the assessment of your role and team and work to continually improve.*



# What we give our staff

## Financial Benefits

### Pay

See Job Description / role profile.

Our pay policy includes progression as people train and develop experience, as well as an annual review which considers cost of living rises. We also benchmark our salaries against market trends to make sure your pay is in line with the wider market.

### Pension

Citizens Advice South West Surrey will provide an employee pension scheme with employer contributions of 5% of the applicable earnings amount into this scheme.

### Perks and Savings

Through our partnership with TELUSHealth (formerly LifeWorks), we are able to support our colleague's financial wellbeing with savings on everyday purchases and important life events, such as getting married, buying a home or car, family outings and holidays.

### Free on-site tea, coffee and milk

Providing a good working environment for colleagues is important to us which is why we offer staff on-site access to free hot beverages in all our offices.

### Sickness payments

When you're ill we offer enhanced sick pay of:

- up to 2 weeks during your probation period,
- 1 month's full pay and 2 months' half pay after this and up to 2 years,
- 2 months' full pay and 2 months' half pay, after 2 years of service.

### Expenses

CASWS will cover subsistence and travelling expenses reasonably and properly incurred in the course of your employment and with prior approval in line with an updated expenses policy. This will cover business travel only and not regular commuting costs.

# Work-life balance

## Working hours

See Job Description / role profile. Full-time paid colleagues are contracted to work 37 hours per week. Those working over 6 hours must take an unpaid half hour break.

We are open to discussion about flexible working, which may include arrangements such as part-time working, fixed (non-standard) working hours, working from home and job sharing.

## Annual Leave

Colleagues are given 26 days annual leave, plus bank holidays, pro rata per year from 1 January to 31 December. Two days of long service leave are also awarded, with one additional day after completion of 4 years' service, and a further day after completion of 6 years' service.

We close on all public holidays and, at the discretion of CASWS, for up to 5 days during the Christmas period. You are required to take such days as part of your paid leave entitlement if that is a day on which you would otherwise be working. We also recognise that sometimes additional leave is needed for circumstances beyond someone's control like a bereavement and offer additional discretionary special or compassionate leave.

## Maternity, adoption and shared parental leave

We offer maternity, adoption and shared parental leave schemes in line with statutory entitlements.

## Flexible working

We understand that staff who balance their work and home responsibilities effectively are more engaged and productive. We are committed to providing a successful Work-Life Balance approach, which balances the needs of the service with individual wellbeing. Examples of flexible working arrangements might include:

- Working part-time or job sharing
- Changing your hours of work
- Working from home for part or all of the time

## **Location**

See Job Description / role profile.

All employees will have agreed location(s) which are determined by the requirements of the role. Most roles will have a reasonable expectation to work across locations in our area, dependent on the need of the role.

## **Employment Status**

Permanent. (In some circumstances we will offer fixed term roles where the role is for genuine fixed-term transformation or cover).

# **Health and wellbeing**

## **Employee assistance programme (EAP)**

Our employee assistance programme, provided through our partnership with TELUSHealth (formerly Lifeworks) gives everyone working at the organisation immediate access to professional and completely confidential counselling and advisory services.

The service also provides:

- A free 24 hour, 365 days a year confidential helpline of which the issues do not need to be work-related
- Advice on a wide range of issues - legal, consumer, family, financial, medical, work, stress
- Free counselling - via telephone or face-to-face
- Free advice and counselling (not face-to-face) for staff family members residing at the same address
- Serious illness and accident cover support
- Staff management - support to managers from counsellors, HR specialists, or OH psychologists
- The EAP has a website with supporting materials and an app is also available

Most of the services can also be used by members of your family normally resident with you, including children living away from home at college or university.

TELUS Health - All colleagues have access to our TELUS Health platform which contains a range of courses and tools to help you navigate life changes and issues. Togetherall - All colleagues have access to Togetherall which is an online mental health and wellbeing service that offers anonymous, confidential peer support 24 hours a day, 365 days a year.

## **Occupational Health (OH) service**

The OH service used by CASWS is aimed at supporting all paid colleagues in the workplace, including advising on return to work after long term absence or advising on workplace adjustments as appropriate.

## **Free eye tests**

You're entitled to a free full eye test, every year in some cases and we'll provide a voucher for this. If you need special corrective glasses and lenses for regular use of computers, we'll cover the cost of these or a contribution to them if you want to upgrade them.

## **Learning, development and growth opportunities**

Our people are at the heart of our service and we recognise that as individuals grow, learn and develop - so too does our organisation.

## **Regular training**

We have a co-ordinated training plan. This means we will provide training for you in your role and support you in taking forward opportunities for your development.

## **Regular 1-2-1 support sessions with your manager**

We think it is important that you get regular time with your line manager which is why all colleagues have regular support sessions with their line manager to discuss performance, personal development and organisational development opportunities.

## **Equity, Diversity, and Inclusion**

At Citizens Advice South West Surrey, we recognise the positive value of diversity, promoting equity and celebrating inclusion. We welcome and encourage job applications from people of all backgrounds.

Our aim is that our workforce will be truly representative of all sections of society. Everyone should feel respected and valued and able to achieve their full potential. You can read more about our approach to equality, diversity and inclusion [here](#).

## **Network groups**

You can join one of our nationwide staff equity groups that include:

-  Race, ethnicity and cultural heritage group
-  Disability group



🗨️ LGBTQ+ group

🗨️ Trans and Non binary group

These provide peer support, influence in the organisation and run various events throughout the year.

## **Dignity at work**

Citizens Advice South West Surrey is committed to providing a culture in which all staff value each other and can work together to their full potential in an inclusive environment free from harassment, bullying and other unacceptable forms of behaviour. Unacceptable behaviour in the workplace will be actively dealt with, all complaints will be taken seriously, confidentiality will be respected and victimisation of those that raise complaints will not be tolerated.

We have clear fundamentals and values which we developed with our staff, volunteers and trustees. These are at the heart of our work and include our purpose, how we deliver this, who we support, our identity and how we show this. This includes core values and behaviours we expect all our people to demonstrate – collaborative, inclusive, supportive and with integrity.

All our employees are expected to have read and understood our Dignity at Work Policy and to ensure they behave in accordance with its principles. All staff are responsible for helping to create and maintain a positive and inclusive working environment free from bullying and harassment. All managers have a particular responsibility for ensuring a supportive and inclusive working environment in which dignity at work is actively promoted.

## **Political Impartiality**

An important part of the principle of impartiality is that Citizens Advice staff are seen to be upholding the principle of party-political impartiality. To avoid misunderstanding or conflicts of interest, guidelines have been established on staff taking part in party political activities. If you currently hold or are intending to stand for local or national political office, then we will expect you to tell us about this if shortlisted for interview.

## **Disclosure and barring service checks (DBS)**

Some positions may require people undergo a DBS check. We follow [national Citizens Advice policy on this](#), to ensure all sensitive information is handled appropriately.