

## Blairgowrie and Rattray Development Trust Ltd - Finance Officer

### Job Description and Person Specification

1.	<p><b>JOB TITLE:</b> Finance Officer (Part-time – 14 hours per week)</p> <p><b>REPORTS TO:</b> Chair of the Board of Trustees</p> <p><b>CONTRACT:</b> Fixed Term to 31<sup>st</sup> March 2021</p>
2.	<p><b>PURPOSE OF JOB</b></p> <p>To ensure that financial recording, reporting and forecasting procedures are in place and operating effectively for Blairgowrie and Rattray Development Trust</p> <p>To provide sound financial advice to the Trustees.</p> <p>To act as company secretary to the charity working closely with the Chair and Board of Trustees.</p>
3.	<p><b>ORGANISATION AND JOB CONTEXT</b></p> <p>The post will be located in Blairgowrie but until the Covid 19 emergency is over remote working will be the norm.</p>
4.	<p><b>PRINCIPLE ACCOUNTABILITIES</b></p> <ul style="list-style-type: none"><li>a) To produce annual financial statements for BRDT, and to arrange for their audit, filing and distribution.</li><li>b) To assist in production of strategy documents and associated forecasts, annual budgets and forecast revisions and other forecasts or analyses of performance as required for both internal and external use.</li><li>c) To maintain appropriate accounting records using Sage and ensure timely production of management information for the Trust in a format and frequency directed by the trustees.</li><li>d) To process all payments and invoices required and to ensure all bank accounts are correctly maintained.</li><li>e) To assist in development of policies and procedures, including, but not limited to, those affecting risk management and financial controls.</li><li>f) To process the payroll and ensure that payments and returns to the HMRC are completed as required, including monthly RTI.</li><li>g) To ensure that all pension requirements are fulfilled in a timely manner.</li></ul>

	<p>h) To provide Company Secretarial services to the Trust, including attendance at board meetings.</p> <p>i) To ensure that relevant financial returns are provided to all external bodies (HMRC, OSCR, Companies House, etc.) in a timely manner.</p> <p>j) To assist in managing project finances including the preparation of grant applications where required.</p> <p>Note: This role description is not exhaustive. It is a reflection of current requirements and as such should be viewed as a guide rather than an exact description of duties and responsibilities. It may be subject to variation from time to time in accordance with the evolving organisational requirements.</p>
5.	<p><b>WORKING RELATIONSHIPS</b></p> <p><b>Internal</b></p> <p>Regular contact with Chair, Trustee responsible for finance and Development Officer Attendance at Trustee/Board meetings</p> <p><b>External</b></p> <p>Contact with suppliers, HMRC, auditors, bankers, OSCR, Companies House, other Government departments as required</p> <p>Contact with grant beneficiaries and grant awarders.</p>

Specification	Minimum	Preferable
<b>Education and Training</b>	<ul style="list-style-type: none"> <li>• Educated to degree level</li> <li>• CCAB qualified</li> </ul>	<ul style="list-style-type: none"> <li>• Experience of a similar or comparable role for at least 5 years</li> <li>• Experience in Sage</li> <li>• Charity accounting experience</li> </ul>
<b>Specific Job Skills</b>	<ul style="list-style-type: none"> <li>• Accounts preparation (statutory &amp; management accounts)</li> <li>• Payroll</li> <li>• Pensions auto enrolment</li> </ul>	<ul style="list-style-type: none"> <li>• Understanding of the specific financial needs of the charity/not-for-profit sector (including SORP; fund accounting etc.)</li> </ul>

Specification	Minimum	Preferable
<b>Specific Job Skills (Cont.)</b>		<ul style="list-style-type: none"> <li>• Experience of implementing systems and control procedures</li> </ul>
<b>Computer Skills</b>	<ul style="list-style-type: none"> <li>• Competent in use of standard office packages (spreadsheet; word processing; database; presentation software) and Sage.</li> </ul>	<ul style="list-style-type: none"> <li>• Advanced spreadsheet skills</li> <li>• Able to deal with most IT issues on own ability</li> </ul>
<b>Experience</b>	<ul style="list-style-type: none"> <li>• 3 years PQE</li> </ul>	<ul style="list-style-type: none"> <li>• 5 years PQE, with experience in both commercial and charity sectors</li> <li>• Experience in grant applications.</li> </ul>
<b>Communication Skills</b>	<ul style="list-style-type: none"> <li>• Good verbal and written communication skills</li> </ul>	<ul style="list-style-type: none"> <li>• Able to communicate financial information to non-financial colleagues at all levels</li> </ul>