



# Recruitment Pack

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Dear Applicant

**Finance Manager Vacancy**

Thank you for expressing your interest in the Finance Manager vacancy with us here at Crossroads.

Further details of this post and how to apply can be found within our application pack.

In respect of the completion of our application form, you should complete all sections in black ink or typescript.

Your completed application form should be returned by email to [manager@crossroadspert.org](mailto:manager@crossroadspert.org)

The closing date for receipt of applications is **15 January 2021**.

We will shortlist all applications as soon as possible after the closing date. If you have not received an email or letter inviting you for interview within 14 days after the closing date, it is with regret that your application has been unsuccessful on this occasion.

We wish you good luck in your application.

Yours sincerely

*Recruitment Team*

Recruitment Team  
**Crossroads**

## Our Recruitment and Selection Process

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Our recruitment and selection process will ensure that we select the most suitable person for the job in respect of skills, experience and qualifications to deliver our strategic objectives and the ability to make a positive contribution to the values and aims of the organisation.. To this end, we will recruit candidates who are most suited to the position in question and will comply with our Equal Opportunities and Equalities policy at all times and in line with our obligations under the Equality Act 2010.

We will treat all job applicants in the same way at each stage of the recruitment process, and no assumptions will be made on the basis of, for example, appearance or a foreign name or the assumption that a foreign national or someone from an ethnic minority does not have the right to work in the UK.

## Equal Opportunities and Equality

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It is against our Equal Opportunities and Equality Policy to discriminate either directly or indirectly on the grounds of race, nationality, ethnic origin, gender, marital status, pregnancy, age, disability, sexual orientation, gender reassignment, ethnicity, cultural or religious beliefs. Reasonable adjustments to the recruitment process will be made to ensure that no applicant is placed at a disadvantage.

We will ensure that no applicant receives less favourable treatment than another on the grounds of disability, gender, race, religion or belief, age, sexual orientation, marital status, parental status, caring responsibilities or hours of work.

When writing our job descriptions, we will ensure that no job applicant receives less favorable treatment than another on the grounds of disability, gender, race, religion or belief, age, sexual orientation, marital status, parental status, caring responsibilities or hours of work, and that no applicant is placed at a disadvantage unjustifiably by requirements or conditions which have a disproportionately adverse effect on a particular group.

## Applicant Privacy

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We are committed to being clear and transparent about how we will collect and use applicant's data and meeting our data protection obligations. During the recruitment process, we will collect and process personal data relating to job applicants.

Further information can be found within our Applicant Privacy Notice.

## How to Apply

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Should you wish to apply for the post, please complete and return your application form clearly demonstrating your suitability for this role by email to [manager@crossroadsp Perth.org](mailto:manager@crossroadsp Perth.org)

## Closing Date

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Please ensure your application arrives by **12 noon on Friday 15 January 2021.**

## Our Job Description

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Our job descriptions are a key document in our recruitment and selection process. All job descriptions will clearly and accurately set out the duties and responsibilities of the job role.

## Our Person Specification

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Our person specification is of equal importance to the job description and informs the selection decision. It details the skills, experience, qualifications, abilities and expertise that are required to do the job. It will be specific, related to the job, and not unnecessarily restrictive .

The person specification forms the basis of the selection decision and enables the selection panel to ensure objectivity in their selection.

## Application Form

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You can download a copy of our application form from our website [www.crossroadspertth.org](http://www.crossroadspertth.org)

All candidates for all of our posts, including internal applicants, will be asked to complete our standard application form, in order that all applicants can be judged on the basis of comparable information.

The submission of Curriculum Vitae's (CV's) for all advertised posts will not be accepted.

Part 1 of our Application Form which contains your personal details including name, address, sex, gender, ethnicity, disabilities, age, sexual orientation, faith, religion or beliefs will not be shared with the recruiting manager and interview panel for the shortlisting purposes.

Part 2 of our Application Form detailing your reference number only will only be made available to those directly involved in the recruitment and selection process.

## Criminal Convictions or Pending Charges

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You will be asked to declare on the application form whether you have ever been convicted of any criminal offence which cannot be regarded as 'spent' in terms of the Rehabilitation of Offenders Act 1974 (Exceptions) Order 1975 (as amended in 2013) or whether you have any criminal charges pending.

## Interviews

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Interviews will be scheduled as soon after the closing date as reasonably possible.

If you are shortlisted for interview you will be notified of this in writing by post or by email. If you have provided your email address, we will normally contact you this way.

We are asking for your support and understanding to help us to minimise the risk of COVID-19. In order to keep everyone safe, our office is currently closed we therefore anticipate that all successfully shortlisted candidates will be invited to attend their interview virtually via Zoom. We continue to take guidance from the Scottish Government in relation to this.

If you have not heard from us within 2 weeks of the closing date, please assume that unfortunately, on this occasion, your application has not been successful.

## Safeguarding

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We are committed to safeguarding and promoting the welfare of children and adults and this role will require you to share this commitment.

If you are successful and offered the post you will be required to undertake a criminal record check via the Protection of Vulnerable Groups (PVG) through Disclosure Scotland.

## Confirmation of Right to Work in UK

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We have a legal responsibility to ensure that you have the right to work in the UK therefore if you are given an offer of employment you will be subject to the submission of the appropriate documentation evidencing this.

It is essential that we apply the same criteria to every person who is offered employment with us, regardless of race, nationality or ethnic or national origins and therefore this check will be undertaken for all new employees offered employment with us.

## Probationary Period

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This post has a six (6) month probationary period.

## Job Description – Finance Manager

<b>Salary or Hourly Rate:</b>	£25,000 per annum pro rata
<b>Hours of Work:</b>	28 hours per week
<b>Location of Work:</b>	Perth, Scotland
<b>Contract Type:</b>	Part-Time Permanent
<b>Qualifications Required:</b>	HND in Accounting and Finance or equivalent level

### Background

Crossroads (Perth & Kinross) is an independent charity providing excellent quality respite and care at home to the residents of Perth & Kinross, both privately and via Perth & Kinross Council. We employ upwards of 50 staff and have an annual turnover approaching £1m.

### Role

An excellent opportunity has arisen for a high calibre, self-motivated individual with accounting and business acumen to join our successful charity and assume full responsibility for our finance function and data reporting.

Approximately 60% of the role is a traditional accounting function and 40% is in support of the Service Manager, particularly in relation to Business Planning and satisfying the many administrative and compliance functions of the charity which come from external organisations such as Perth & Kinross Council and the Care Inspectorate.

The role involves completing all aspects of the day-to-day and the strategic management of our finance function, from data entry to preparing fully accrued monthly management accounts for the board and trial balance for the annual audit, as well as taking responsibility for the software packages used and the quality and efficiency of all data processes. You will assume complete responsibility for Financial data within the organisation and its internal and external reporting.

As well as being qualified to at least HND level in Accounting/Finance, or working towards this, you will also be required to have previous experience of working with various level of stakeholders as the job involves being able to engage directly with our staff at all levels, our Board of Directors, external agencies, as well as our clients and their families.

You will be a member of the Senior Management team and play a key role in the continuous development and growth of the organisation.

### Key Responsibilities

- Processing of monthly Payroll using Sage Payroll and daily processing of financial transactions relating to Purchase Ledger, Sales Ledger, Banking and Payroll (including journals) and accruals/prepayments using Sage Online Accounting and online banking.
- Managing and resolving invoice and payroll queries in a professional and timely manner.
- Manage Debtor and Credit Control, working with the senior management team to ensure all income is received and all payments made.
- Production of monthly management accounts, including actual v. budget and variances for the board
- Production of weekly KPIs for senior management and the board.
- Ensure accuracy of financial records through accurate processing and monthly reconciliation of banking, control account and all elements of the Trial Balance.

- Utilise excellent knowledge of our core data management system, Webroster, enabling the preparation of internal and external reports, as required, e.g. for regulatory and funding organisations.
- Own the production of the annual business plan, including preparation of the annual budget and reforecasts as required.
- Prepare Balance Sheet reconciliations and other data for the external auditors. Liaise with the auditors regularly during the audit and respond to all subsequent data requests.
- Ensure financial records are maintained in accordance with data protection and other relevant legislation.
- Ongoing strategic review of finance function, including software used, to ensure best practice.
- As part of the Senior Management team, work with the Board to ensure that performance is consistent with the organisation's strategic plans, principles, procedures and policies.
- Take a pro-active role in supporting the implementation of our organisational strategy within the organisation and in the future to meet service aims and objectives.
- Positively raise the profile of Crossroads and the services we provide through collaborative working with external agencies.
- As part of the Management Team, deputise for certain duties of the Service Manager, as appropriate, and when required.
- Instigate and undertake such personal training and continuous professional development as may be required to keep up-to-date with appropriate legislation and fulfil the professional requirements identified for this post.

This job description is broad-based and is not intended to be an exhaustive list of all possible duties. It is recognised that in line with the changing needs of the organisation, there may be a requirement to review this job description from time to time to ensure that it accurately reflects the duties associated with this role.



## Person Specification – Finance Manager

The person specification details the knowledge (including necessary qualifications) skills and abilities, experience and aptitudes required to do the job, specifying which are essential and which are desirable.

Only applicants that meet all of the Essential criteria will be shortlisted for interview.

### Person Specification

	Essential	Desirable
HND in Accounting/Finance or equivalent	✓	
Experience of accounting and payroll software, preferably Sage Online Accounting and Sage Payroll software	✓	
Experience in the management and operation of monthly payroll	✓	
Understanding of budgeting and financial/business planning	✓	
Ability to develop and implement systems responsive to the changing needs of the organisation and legislative changes	✓	
Excellent communication (written and verbal) and reporting skills	✓	
Ability to clearly explain technical financial information to non-finance specialists	✓	
Positive leadership and management skills	✓	
Excellent analytical and reporting skills	✓	
Good IT skills, including Excel	✓	
Able to work accurately and efficiently with minimal supervision, including working from home when necessary.	✓	
A positive, flexible and solution focused approach to work	✓	
Ability to work as part of a team	✓	
Ability to use own initiative and prioritise own workload efficiently	✓	
Commitment to ongoing personal development	✓	
Experience of producing financial reports for a range of audiences		✓
Previous experience of designing, developing and management of processes and procedures to promote efficiency		✓
Sound working knowledge of Data Protection requirements		✓
Previous experience of working effectively in collaboration with a wide range of external agencies and partners		✓
An understanding of the Third Sector financial landscape, including statutory commissioning, tenders and grant funding		✓
A working knowledge of accounting in the Charity Sector including OSCR requirements.		✓

## Job Applicant Privacy Notice

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### Introduction

During our recruitment process, we will collect and process personal data relating to job applicants.

We are committed to being clear and transparent about how we collect and use that data and to meeting our data protection obligations.

### What Information Do We Collect and Process?

We will collect and process a range of personal information (personal data) about you. Personal data means any information about you from which you can be identified. This includes:

- Personal contact details, such as your name, title, address, and contact details, including email address and telephone number.
- Details of your qualifications, skills, experience, and employment history, including start and end dates, with previous employers.
- Information about your remuneration.
- Information about your entitlement to work in the UK.
- Information about any criminal convictions
- Equal opportunities monitoring information, including information about your ethnic origin, sexual orientation, religion, or belief.

We collect this information in a variety of ways during the application and recruitment process. For example, data may be contained in application forms, obtained from identity documents, such as your passport and collected through interview.

In some cases, we may collect personal data about you from third parties, such as references supplied by former employers, information from employment background check providers and information from criminal records checks permitted by law.

Data is stored in a range of different places, including on your application record, in our HR management systems and in other IT systems (including our email system).

### Why Do We Process Personal Data?

We need to process data prior to entering into a contract with you. We also need to process data to enter into an employment contract with you and to meet our obligations under that employment contract.

In addition, we need to process data to ensure that we are complying with our legal obligations. For example, we are required to check that you are entitled to work in the UK before your employment begins.

We have a legitimate interest in processing personal data during the recruitment process and in keeping records of that process. Processing such data from job applicants enables us to manage the recruitment process, assess the suitability of candidates and make informed decision as to whom we wish to recruit. We may also have to process data from job applicants in order to defend legal claims.

For certain positions, it is necessary to carry out criminal records checks to ensure that individuals are permitted to undertake a particular role.

### **If You Fail to Provide Personal Information**

You are under no obligation to provide us with data during the recruitment process. However, if you do not provide certain information when requested, we may not be able to process your application for employment properly or at all.

You are under no obligation to provide information for equal opportunities monitoring purposes and there are no consequences for you if this information is not provided.

### **Automated Decision-Making**

Our employment decisions are not based solely on automated decision-making.

### **How Long do we Keep your Data?**

We will only hold your personal data for as long as is necessary to fulfil the purposes for which we collected it. If your application for employment is unsuccessful, we will hold your data on file for 12 months after the end of the recruitment process. At the end of that period, your data is deleted or destroyed.

If your application for employment is successful, personal data gathered during the recruitment process will be transferred to your personnel file and we shall issue a new privacy notice which sets down the periods for which your data will be held.

### **Who Has Access to Data?**

Your information will be shared internally for the purposes of the recruitment process, including with the recruitment panel and our HR Advisor.

We will not share your data with third parties unless we make you an offer of employment. In those circumstances, we shall share your data with third parties where required by law and where it is necessary in order to administer the working relationship with you or where we have another legitimate interest in doing so.

We will not transfer your data to countries outside the European Economic Area.

### **How Do We Protect Data?**

We take your data seriously and we have internal policies and controls in place to prevent your data being lost, accidentally destroyed, misused or disclosed, and is not accessed except by its employees in the performance of their duties.

### **Your Rights**

As a data subject, you have a number of rights. You can:

- Access and obtain a copy of your data on request (known as a “data subject access request”).
- Require us to change incorrect or incomplete data.
- Request erasure of your personal information. This enables you to ask us to delete or stop processing your data, for example where the data is no longer necessary for the purposes of processing.
- Object to the processing of your data where we are relying on our legitimate interest as the legal ground for processing; and
- Ask us to suspend the processing of your personal data for a period of time if data is inaccurate or there is a dispute about its accuracy or the reason for processing it.



If you would like to exercise any of these rights, or you have any questions about the privacy notice, please contact our Service Manager.

If you believe that we have not complied with your data protection rights, you have the right to make a complaint to the Information Commissioner's Office.