

Perth Citizens Advice Bureau



Finance and Resource Manager

Applicant Information Pack



Thank you for your interest in our vacancy!

Perth Citizens Advice Bureau (CAB) has been operating in Perth and Kinross since 1942 and throughout the past eight decades we have been responding to the needs of citizens and providing advice and information on a range of topics including money advice, benefits and debt, energy advice, consumer issues, family issues, employment, immigration and housing issues.

We have a team of 34 staff and 30 volunteers and together we support over 8,000 individuals each year.

The CAB service is vital for the communities we serve, from Kinloch Rannoch to Coupar Angus, from Comrie to Kinross. We support any citizen in Perth and Kinross with high quality advice and information supporting them at all stages of life.



Our Aims

- To ensure that individuals do not suffer through lack of knowledge of their rights and responsibilities or of the services available to them, or through an inability to express their needs effectively and equally
- To exercise a responsible influence on the development of social policies and services, both locally and nationally

Our Principles

Free

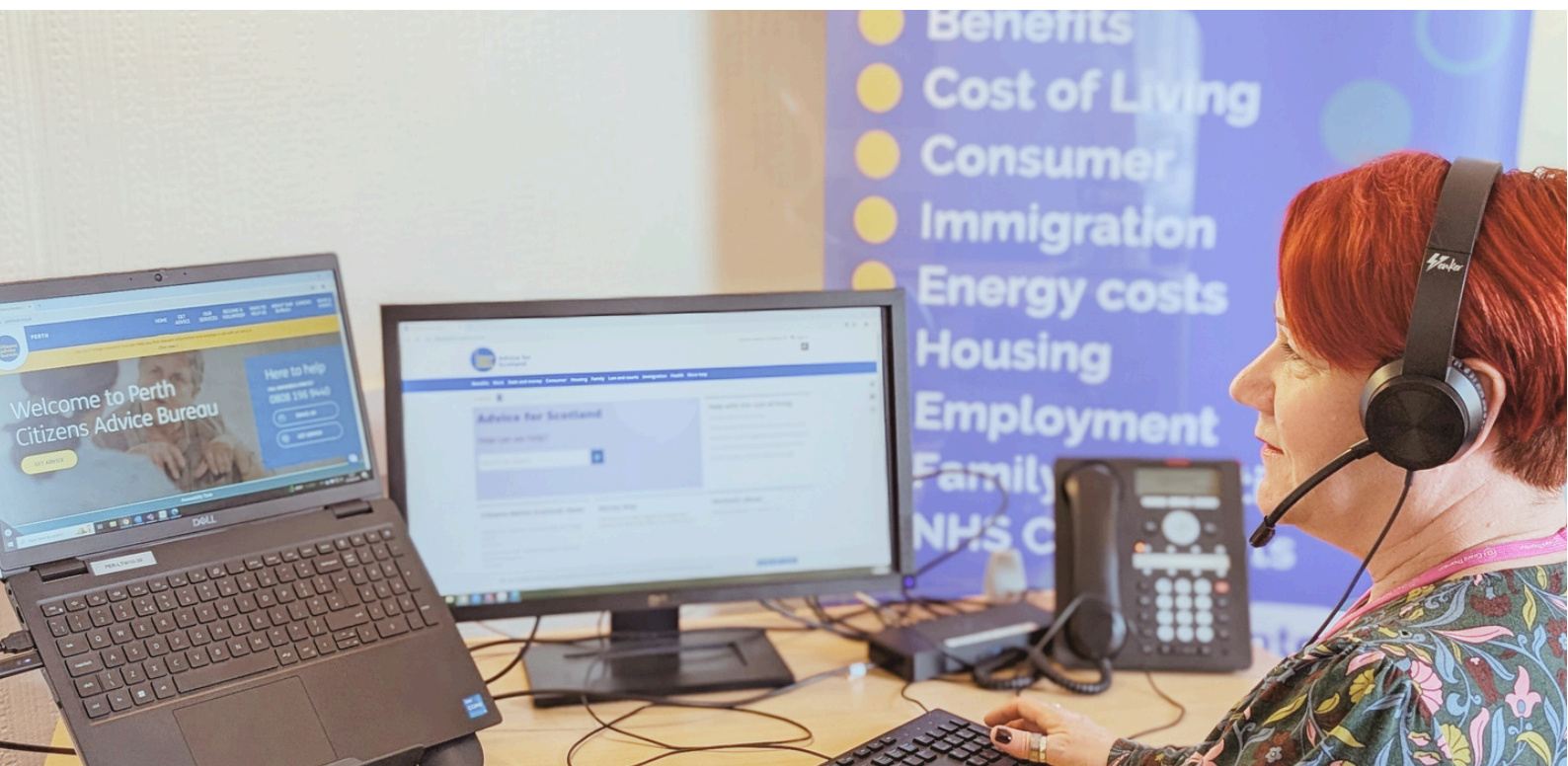
Confidential

Impartial

Independent

Accessible

Effective



Our Vision

- We believe that everyone in Perth and Kinross should have access to free, impartial and confidential advice that helps them make informed decisions whenever they need it
- Our vision is a Scotland where everyone has the advice and information they need to realise their rights and where barriers to accessing those rights are effectively challenged

Our Mission

- We help people navigate systems and access their rights
- We build resilience in local communities
- We support the realisation of human rights
- We help change policies and practices to ensure they work for people





Why work with us?

Our team of staff and volunteers are our greatest strength and make Perth CAB a great place to work.

Work/life balance is as important to us as it is to you and our working practices support this as much as possible. We offer generous annual leave and flexible working opportunities. Hybrid and remote roles are available.

We strive to have a work environment where staff thrive in their roles and ensure that staff have all the tools and learning opportunities to carry out their roles enjoyably and to the best of their abilities.

Our cultural values are:

- Empowering
- Supportive
- Inclusive
- Collaborative



The Role

Job Title:	Finance and Resource Manager
Responsible to:	Chief Executive Officer
Accountable to:	Board of Directors, Finance and Development Sub Committee
Responsible for:	Admin Team (2 x Office Administrators 1 x Finance and HR Administrator)
Location:	Hybrid between home and Perth office
Hours per week:	35
Salary:	£39,113

Summary of Main Responsibilities

The Finance and Resource Manager is an essential leadership role which ensures robust management of the organisation. Reporting to the CEO, the post holder will have executive accountability to the Board of Directors. This is a diverse role with a wide remit of responsibility. Financial management is at the core of the role, ensuring the responsible administration of £1.2 million of annual income and expenditure in line with statutory and best practice monitoring and reporting requirements.

Supported by the admin team, this role also takes responsibility for HR administration and Facilities management.

The post holder will collaborate closely with the CEO to foster and enhance a positive and supportive organisational culture. This will involve implementing strategic initiatives that promote employee engagement, inclusivity and overall wellbeing within the organisation.

Main Responsibilities

Bureau Management, Leadership and Governance:

- Encourage good teamwork and culture with open communication between all members of staff
- Create a positive working environment in which equality and diversity are well managed, dignity at work is upheld, and staff can do their best to support clients
- Take responsibility for a number of strategic objectives and ensure timely monitoring of KPI's.
- Make arrangements for the Annual General Meeting and ensure that all the procedures are adhered to as required by the company's articles
- Line manage staff and provide regular support and supervision and training
- Arrange and attend board meetings, ensuring the timely distribution of relevant documents, taking minutes and carrying out the Board's instructions when required. Attending and minuting the Finance Subcommittee
- Deputise in the Chief Executive's absence when required



Financial Management

Including the delegation of tasks to the Finance and HR Administrator, take responsibility for:

- Being accountable to the CEO and Finance and Development Subcommittee for all financial systems, ensuring that all finances are properly administered and monitored
- Using Sage to set up and monitor cost centres for separate projects and services
- Preparing quarterly management accounts
- Producing draft end-of-year accounts and liaising with the appointed auditor to finalise the accounts each year with the support of the Chief Executive and Treasurer
- Ensuring compliance with financial reporting obligations in relation to funding, grants, contracts and other initiatives
- Acting as a signatory and authorising expenditure within pre-determined limits
- Preparing and reviewing budgets in liaison with the Chief Executive
- Processing the payroll (with our payroll providers) and ensuring adherence to all relevant legislation regarding tax, national insurance, pension and other deductions or payments
- Liaising and negotiating with suppliers to ensure good cost control

Project Management

- Working with the Chief Executive and Business Development Manager to develop new projects and to prepare funding applications
- Monitoring and recording all project income and expenditure and preparing funding reports as required by individual funders

HR Administration

Including the delegation of tasks to the Finance and HR Administrator, take responsibility for:

- Maintaining accurate staff records using our online HR management tool Safe HR – including working with line managers to ensure sickness information, appraisals and support and supervision are all in place
- Supporting the Chief Executive with the recruitment and induction processes
- Administering the Bureau's annual leave processes
- Ensuring mandatory training is carried out, booking external training and monitoring training budgets
- Supporting the Chief Executive with HR issues including taking minutes at grievance or disciplinary hearings and ensuring paperwork is effectively administered

Facilities and Administrative Management

Including the delegation of tasks to the Office Administrators, take responsibility for:

- Managing the reception and general office administration
- Managing our IT inventories
- Managing the external cleaning contract
- Ensuring office maintenance and repairs are carried out
- Ensuring timely ordering of stationery and housekeeping equipment
- Ensuring that the bureau has effective document control

Any other relevant activity as required by the CEO



Person Specification

Essential

- CCAB/CIMA qualified accountant
- Demonstrable experience working as an accountant within a finance team
- Experience designing and introducing new financial systems and procedures
- Substantial and demonstrable financial knowledge and experience covering all major aspects of the finance functions
- Experience and knowledge of financial and payroll systems
- Proven skills in influencing, communication and working collaboratively with stakeholders and employees at all levels
- Ability to evidence personal drive, innovation and confidence
- Resilient with the flexibility and adaptability to self-manage and work on own initiative
- Demonstrable experience of line managing a small team
- Knowledge and experience of customer service best practice

Desirable

- Knowledge and experience of Scottish charity accounting under the OSCR regulatory framework
- Knowledge and experience of HR Administration practices



How to apply

To apply please complete the accompanying application form by the closing date of **Friday 4th October at 5pm.**

Interviews will be held in person in Perth on Monday 14th October

We would welcome any approach for an informal chat to discuss this role. To set up a time to chat with Jane Adams, our CEO, please email finance-hr@perthcab.org.uk

