

Finance & Corporate Services Manager

- Application Pack – Job Description & Person Specification



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Application Process

Closing date: 14.9.26

Interview date: 22.9.26

To apply for this post, please email the following to julia.duncan@greenteam.org.uk:

- A tailored CV outlining your experience and highlighting your key skills, achievements and attributes.
- A supporting letter and/or personal statement which should include:
 - why you are interested and a good fit for the role of Finance & Corporate Services Manager with The Green Team;
 - what you would specifically bring to the role; and
 - evidence of relevant experience that would help you thrive in the post.

Alternatively, applications can be posted to:

Julia Duncan

Co-CEO Corporate Development

The Green Team
20 New Mart Road
Edinburgh
EH14 1RL

The Green Team is an equal opportunity employer and recognises the benefits that a diverse workforce, with different values, beliefs, experiences and backgrounds, brings. We are committed to building an inclusive culture where everyone feels valued, included and able to be at their best.

Background - The Green Team

At The Green Team, we are passionate about supporting young people to find their place in nature. We believe every child and young person should have opportunities to experience and connect with the natural environment.

Founded in 1995, The Green Team has grown from a small organisation supporting young people undertaking the Duke of Edinburgh's Award into an established environmental charity delivering a wide range of programmes, holiday activities, environmental awards and corporate experiences.

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Our work supports both environmental and personal development outcomes. We help young people build confidence, develop skills, improve wellbeing and strengthen their connection with nature, others and themselves.

Our vision: A Scotland where everyone values and can enjoy the natural environment.

Our mission: To provide transformational outdoor experiences that connect children and young people to nature, others and themselves.

Our aims: Through our programmes we provide lasting and positive experiences across three core areas: connecting with nature, connecting with others and connecting with self. We are committed to building a sustainable and resilient organisation that can continue delivering positive impact for young people and the environment.

The Role

We are looking for an experienced and collaborative **Finance & Corporate Services Manager** to take ownership of Green Team's finance function and help strengthen the organisational systems and infrastructure that support our work.

This is a hands-on role within a small charity. **Significant charity finance experience and strong practical Xero skills are essential.**

The successful candidate will be confident managing day-to-day finance while also contributing to financial planning, reporting, systems development and organisational resilience.

The role also includes oversight and coordination of key corporate services such as IT systems, cyber security, business continuity, contracts and insurance. The postholder is not expected to provide specialist technical IT or cyber security support; they will work with appropriate external providers and advisers.

Just as importantly, we are looking for someone who enjoys working collaboratively. The postholder will work closely with the Co-CEO Corporate Development, the wider staff team, Treasurer and Trustees, and will help colleagues understand and confidently engage with financial information and systems.

Role Details:

Post Title: Finance & Corporate Services Manager

Salary: £44,020 (FTE) £25,678 (pro-rata salary)

Responsible to: Co-CEO Corporate Development

Location: 20 New Mart Road, Edinburgh, EH14 1RL, with hybrid working available subject to organisational needs

Hours of Work: 21 hours per week

Holidays: 21 days a year

Benefits: 5% employer pension contribution on basic salary

Contract: Permanent

Key Responsibilities

1. Financial Management and Reporting

- Take day-to-day ownership of Green Team's finance function.
- Maintain accurate financial records using **Xero** and associated systems including Apron.
- Review and continually improve Xero structures and processes to support effective reporting and decision-making.
- Produce timely monthly management accounts.
- Prepare clear financial reports for the Co-CEOs, Treasurer, Finance Subgroup and Board.
- Monitor actual income and expenditure against organisational and programme budgets.
- Investigate and explain variances and identify emerging financial issues.
- Maintain rolling cashflow forecasts.
- Support annual organisational and programme budget preparation and longer-term financial planning.
- Monitor reserves and unrestricted funds.
- Provide clear and accessible financial information to non-finance colleagues.

2. Restricted Funds and Programme Finance

- Maintain accurate records of restricted and unrestricted funds.
- Monitor expenditure against grant and project budgets.
- Ensure income and expenditure are appropriately coded and allocated.
- Work collaboratively with programme leads to help them understand and manage budgets.
- Prepare financial information for grant applications, grant claims and funder reports.
- Maintain oversight of grant income, payment schedules, conditions and reporting deadlines.
- Identify potential underspends, overspends, transfers or ineligible expenditure at an early stage.
- Support project costing and assessment of the financial implications of new programmes and funding opportunities.

3. Payroll, Banking, Payments and Income

- Process monthly payroll and maintain appropriate records.

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- Administer pension submissions and employee changes.
- Ensure payroll journals are accurately posted and reconciled in Xero.
- Ensure compliance with relevant HMRC requirements.
- Maintain oversight of bank accounts and regular bank reconciliations.
- Coordinate supplier payments, staff expenses and recurring payments.
- Ensure payments are properly authorised and supported by appropriate documentation.
- Maintain appropriate segregation of financial duties and delegated authority.
- Monitor debtors and follow up outstanding income.
- Reconcile income received through grants, contracts, invoicing, donations and online payment platforms including Stripe, Bookwhen, Givey, JustGiving and Benevity.

4. Annual Accounts, Controls and Compliance

- Prepare year-end schedules and working papers.
- Liaise with external accountants and coordinate annual independent examination/audit requirements.
- Support preparation of the annual report and accounts.
- Maintain clear financial audit trails.
- Maintain and improve proportionate financial policies, procedures and internal controls.
- Support reviews of reserves, procurement, expenses, fraud prevention and delegated authority.
- Support statutory financial submissions to OSCR and Companies House.
- Identify and escalate significant financial risks appropriately.

5. Corporate Systems and Organisational Infrastructure

Working in partnership with the Co-CEO Corporate Development:

- Maintain oversight of Green Team's key corporate systems.
- Maintain a corporate systems register covering ownership, administration, permissions, suppliers and renewal dates.
- Coordinate user accounts, licences and permissions.
- Support effective staff onboarding and offboarding across corporate systems.
- Ensure key organisational procedures are documented and stored centrally.
- Review software subscriptions, suppliers and associated costs.

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- Support improvements to systems and organisational processes.
- Liaise with external providers and technical specialists where required.

Corporate systems include, but are not limited to, Xero, Apron, banking systems, Stripe, Bookwhen, Microsoft 365, SharePoint, website platforms, Mailchimp, payroll and pension systems and other organisational software.

6. Cyber Security, Data Protection and Business Continuity

- Coordinate cyber security activity with Green Team's external IT provider.
- Maintain oversight of user access, administrator permissions, multi-factor authentication, password management, device security and backups.
- Coordinate cyber security awareness and incident procedures.
- Support progress towards Cyber Essentials where appropriate.
- Support operational compliance with UK GDPR and information governance requirements.
- Maintain and periodically review Green Team's business continuity arrangements.
- Ensure critical finance and organisational processes can continue during absence, staff turnover, system failure or other disruption.
- Maintain a central calendar of key organisational renewals, deadlines and compliance requirements.

Specialist technical IT and cyber security support will be provided by external professionals.

7. Contracts, Insurance and Organisational Support

- Maintain records of contracts, subscriptions, licences and renewal dates.
- Coordinate information required for insurance renewals.
- Support procurement and supplier reviews.
- Maintain appropriate records relating to equipment and organisational assets.
- Develop clear financial and systems guidance for colleagues.
- Promote a culture of shared responsibility, transparency and good financial stewardship.

Person Specification

Essential Experience, Skills and Knowledge

We are particularly looking for someone who:

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- Has **significant practical experience of charity or third-sector finance**, supported by a relevant accounting/bookkeeping qualification **or substantial equivalent professional experience**.
- Has **strong practical experience using Xero**, including experience of reviewing, improving or developing Xero systems to support effective financial management, reporting and decision-making.
- Has a strong understanding of **restricted and unrestricted charitable funds** and grant-funded project accounting. And knowledge of Scottish charity regulation, OSCR requirements and charity accounting practice.
- Has a **collaborative, approachable and solutions-focused working style**, with the ability to build positive working relationships across a small organisation.
- Has experience producing management accounts, organisational and programme budgets, cashflow forecasts and variance reports.
- Has experience of payroll, pensions, banking, payment processes and financial reconciliations.
- Has experience supporting annual accounts and working effectively with accountants, independent examiners or auditors.
- Understands good financial controls, financial risk management and governance appropriate to a charity.
- Can communicate financial information clearly and confidently to colleagues and Trustees who may not have a finance background.
- Can work collaboratively with programme colleagues to help them understand budgets, funding restrictions and their financial responsibilities.
- Is highly organised, accurate and attentive to detail.
- Can manage a varied workload independently, exercise sound judgement and prioritise effectively.
- Has strong general digital skills and confidence working across online financial and organisational systems.
- Demonstrates integrity, discretion and a strong understanding of confidentiality.
- Is committed to the values and mission of The Green Team.

Desirable Experience and Skills

It would be helpful to have:

- A **recognised professional accounting qualification, or progress towards one**, for example AAT, ACCA, CIMA, ICAS or equivalent.

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- Experience using Apron or other systems integrated with Xero.
- Experience of fundraising, donation and online payment platforms.
- Experience coordinating external IT or cyber security providers.
- Awareness of UK GDPR and information governance requirements.
- Experience of business continuity and organisational risk management.
- Experience working within a small charity, environmental, youth or community organisation.

Personal Qualities

We are looking for someone:

- Who is **practical, collaborative and solutions-focused**.
- And who will enjoy working closely with colleagues and helping others understand and use financial information effectively.
- Who will be comfortable getting into the detail when required, while also being able to step back, identify risks and priorities and recommend practical improvements.

As a small charity, positive working relationships are particularly important to us. You will work closely with the Co-CEO Corporate Development and collaboratively with colleagues across Green Team, providing constructive financial advice and helping staff feel confident in understanding their budgets and financial responsibilities.

The role will suit someone who enjoys bringing clarity, structure and confidence to financial and organisational systems and who wants to use their skills to contribute to a purpose-led organisation.

You do not need to be an expert in every aspect of corporate services. We are looking for someone with **strong financial foundations** who is confident coordinating systems, asking the right questions, working with specialist advisers and ensuring important organisational processes are robust and resilient.