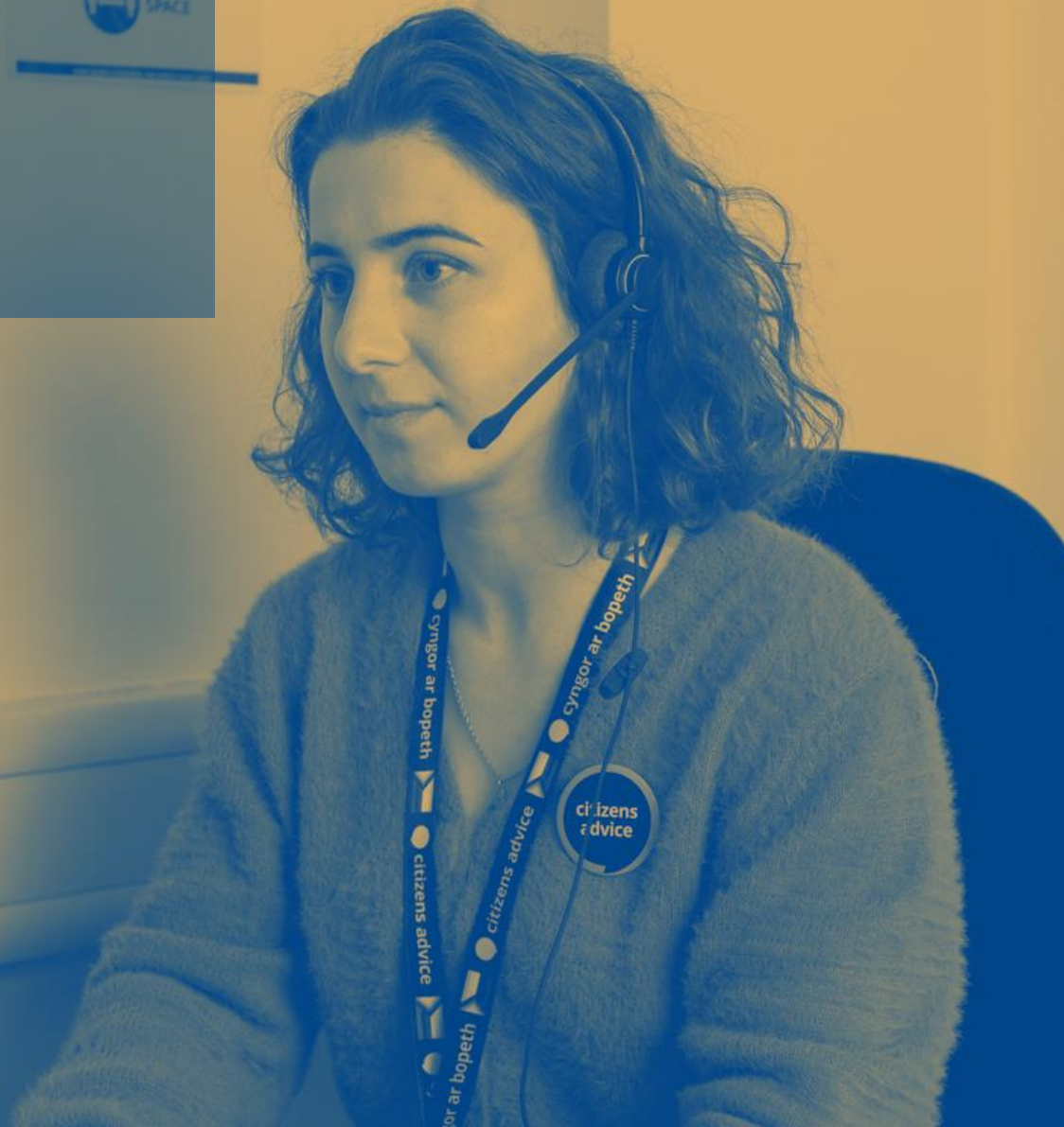
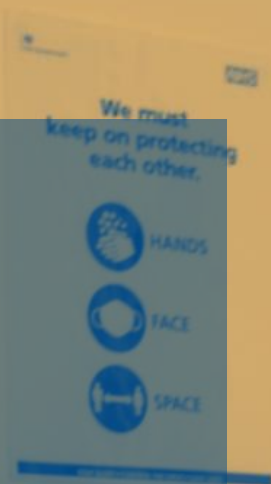


Candidate information pack

Head of Finance and Business Support

**citizens
advice**

Stevenage



Thanks for your interest in working at Citizens Advice Stevenage.

This job pack should give you everything you need to know to apply for this role and what it means to work for us

In this pack you'll find:

- Information about organisation
- Purpose of the job
- Job description and person specification
- Interview and Application Process
- Candidate guidance notes

Want to chat about this role?

If you want to chat about the role further, you can contact Melanie Bel Haj by emailing recruitment@castevenage.org.uk





We help people find a way forward

We can all face problems that seem complicated or intimidating. At Citizens Advice we believe no one should have to face these problems without good quality, independent advice.

That's why we're here: to give people the knowledge and the confidence they need to find their way forward - whoever they are, and whatever their problem.

3 things you should know about us

1. We're local and we're national. Citizens Advice is a Network made up of 4 national offices and 265 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.

Head of Finance & Business Support

Reporting to: Chief Executive Officer (CEO)

Department: Finance and Business Support

Hours: Full time - 37.5 hours per week

Salary: £45 - £55,000 depending on experience

Holidays: 27 days plus Bank Holidays: (Pro-rata)

Location: Office in Stevenage. Hybrid working by arrangement

Contract: Permanent

Purpose of the Job

Working within the aims, policies and principles of the Citizens Advice Service, to lead on financial governance, business support operations, and compliance, ensuring the organization operates sustainably and meets all legal and regulatory obligations. The role is pivotal in safeguarding the charity's financial integrity, supporting strategic decision-making, and enabling effective service delivery.

Citizens Advice Stevenage is an ambitious and innovative member of the Citizens Advice network. We have expanded our services and offering to meet the increased demand in the area, doubling in size over the last few years.

As a positive subsequence, we are looking for a Head of Finance & Business Support, who will become a core member of the Senior Leadership Team, responsible for overseeing the financial stewardship of Citizens Advice Stevenage.

Job Description

Financial Leadership

- Prepare, review, and present draft and final budgets for approval by the board, ensuring timely submission of financial information to the CEO and Trustee Board.
- Oversee financial reporting processes, ensuring accuracy, transparency, and compliance with regulatory standards, including variance analysis and annual balance sheets, ensuring timely submission of financial information to the CEO and Trustee Board.
- Manage the reserves policy, ensuring regular review and alignment with operational needs and financial risks.
- Identify and manage financial risks, ensuring integration into the organization's risk register and adherence to appropriate mitigations.
- Ensure that the day-to-day finance and back-office function is high performing and compliant, safeguarding effective and efficient financial management processes.
- To co-ordinate the proactive and timely dissemination of high-quality financial information to services, the CEO, and Board such as annual budgets, monthly management accounts, cash flow analysis, financial forecasting and monthly business performance figures.

- To ensure that the organisation has in place, robust and compliant financial systems and procedures; and that these are complied with by all budget holders, ensuring that any oversights are fully investigated and reported upwards as necessary.
- To lead on the preparation of statutory accounts, provide year end accounts, provide appropriate support and assistance to the organisation's auditors and delivery of recommendations arising from the Audit process.
- To ensure that all statutory returns are complete in a timely and effective manner, including those in relation to VAT, PAYE, NIC and SSP, and that appropriate compliance dates are met for the Charities Commission and Companies House.
- Oversee the transactions, activities and processes of the external payroll provider.
- To monitor and advise on current and future tax legislation, with a view to optimisation.
- To support service managers in the preparation of bids and contract negotiations and provide financial activity analysis and reports in line with specific project reporting requirements.
- To monitor, report and make recommendations regarding the Investment and Reserves Policy to the Board.
- To oversee the payroll function to ensure employees are paid in an accurate and timely manner.
- To monitor and control creditors and debtors, ensuring invoices are paid on time and the risk of bad debts is minimised.

Compliance and Risk Management

- Ensure compliance with all applicable regulatory frameworks, including the Charity Commission, Companies House, FCA, ICO, and other relevant bodies.
- Maintain and regularly review financial systems, controls, and policies, ensuring they are effectively implemented and aligned with legal requirements.
- Conduct due diligence for pension, redundancy, and other liabilities, ensuring plans are in place for management and mitigation.
- Support the trustee board in understanding risks related to projects and contracts, providing assurance of compliance with funders' requirements.
- To lead on the Risk Management process, advising the CEO and managers on risk matters, and reviewing the risk register on a regular basis, reporting to the Board of Trustees.
- To check, amend and monitor the Financial Procedures Manual; reporting material breaches to the CEO and Board of Trustees, as required/in-line with governance.
- Working with the senior leadership team monitoring and updating Insurance matters as required, reporting to the CEO and Board of Trustees.

Business Support Operations

- Lead on organisational business continuity planning, ensuring resilience during crises and alignment with the charity's objectives.
- Oversee the development, implementation, and review of key policies, ensuring they reflect legal obligations and organisational values.
- Manage IT systems and cybersecurity measures to protect organisational data and operations, ensuring compliance with standards such as Cyber Essentials.

Strategic Contribution

- Provides proactive strategic financial advice and guidance to the Trustees and wider leadership team, monitoring and reporting on the financial performance against agreed targets, identified risks and key performance indicators.
- Provide financial and operational insights to inform strategic decision-making and long-term planning.
- Foster a culture of continuous improvement and financial accountability across the organisation.
- Funding strategy: Support the CEO and board to regularly review the sustainability of its income sources and their impact on achieving charitable purposes in the short, medium and longer term.

- Work with the CEO and Head of Impact and Development to prepare the funding strategy that should go beyond immediate budgetary considerations and look at the wider funding landscape. The organisation needs to understand potential emerging opportunities and the organisation's readiness to pursue them.

Team and Stakeholder Engagement

- Build and maintain effective relationships with trustees, funders, regulators, and key stakeholders, to ensure that Citizens Advice Stevenage meets its financial, regulatory and legal obligations.
- Provide leadership and support to finance and business support teams, ensuring professional development and effective performance management.

People management and development

- Develop and implement a culture of continuous learning that will equip and develop people to deliver outstanding delivery. Responsibility for the training and development plan for the Finance and Business Support ensuring it is in effective operation including maintaining records of training needs identified and training attended.

- Working with the rest of the leadership team ensure the organisation delivers a fair, inclusive, equitable and transparent employee and volunteer experience, taking account of our EDI aims and in line with employment law and the Equality Act 2010.
- Ensure Open and timely communication that provides information about the organisation and context for decisions that are made, helps to build trust and confidence and earn legitimacy.
- Ensure the effective performance management and development of staff through regular supervision sessions, appraisals and learning and development.

Person Specification | What you need to do this job

- ACA/ACCA/CIMA Qualified, CPE up to date.
- Strong financial management experience at a similar level within the charity/not for profit sector
- A proven track record of leading, developing and inspiring small teams
- Experience of strategic business & financial planning, forecasting and budget management.
- Sound experience of producing month-end management accounts and audited year-end financial accounts
- Experience of managing and using financial systems
- A working knowledge of relevant legislation (regulatory, legal and financial) in the context of a charitable organisation
- Experience of managing change and change programmes
- A track record of initiating, leading and managing associated risks
- Strong influencing, negotiating and collaborative working skills, with the ability to present complex financial information clearly and concisely in writing or verbally
- Confident IT skills; confident using Microsoft Office applications, especially Excel
- Experience designing and introducing new financial processes, procedures and reports
- Working knowledge of QuickBooks software [advantageous]
- Experience working with a Board of Trustees [advantageous]
- Understanding of Charity Commission and Companies House reporting requirements
- Project and/or professional services experience
- Understanding of Charity Law
- Experience of working in the not-for-profit sector
- Understanding and experience using the Charity Governance Code
- Experience in working with Charity SORP
- Legal experience – as so far as they can scrutinise and review basic contracts and their revenue recognition requirements and VAT implications
- Strategic and forecasting experience

Application Process:

To apply, please send your CV and a supporting statement addressing each point in the person specification, in the order listed. Use examples and evidence to demonstrate how you meet the criteria.

Submit your application to recruitment@castevenage.org.uk

Incomplete applications may not be considered.

We are an equal opportunity employer. If you have any requirements (e.g. for attending an interview) please note these clearly on in your letter.

Interview Process:

We are currently accepting applications for this role, and the position will remain **open until we have appointed the right candidates. We reserve the right to close the vacancy at any time** once a suitable appointment has been made. We therefore encourage early applications to avoid disappointment.

Shortlisted candidates will be contacted by telephone, so please give a daytime telephone number or somewhere we can leave a message to arrange an interview.

Our selection process consists of three stages:

- Stage 1 – Telephone Interview:
Initial interviews will take place via telephone.
- Stage 2 – Formal Interview (In-Person):
Candidates who are successful at Stage 1 will be invited to our Stevenage office for a formal face-to-face interview.
- Stage 3 – Practical Activity & Final Q&A:
Following the formal interview, candidates will complete a short activity and have the opportunity to ask any final questions.

Please note that Stages 2 and 3 will take place on the same day.

Guidance notes for applicants

Equal Opportunities

We are an equal opportunity employer. Please let us know if you require any adjustments to be made to the application process or if you have any requirements (e.g. for attending an interview). Note these clearly on in your letter. Please be assured that we will be supportive in discussing reasonable adjustments with you at any stage of the recruitment and selection process.

We represent a diverse community, and we want our staff to reflect that diversity. We therefore welcome applications from candidates from under-represented communities. If you feel you meet some of the criteria but not all, we hope you will enquire and learn more. We will support you to further develop your skills accordingly.

Entitlement to work in the UK

A job offer will be subject to confirmation that you are permitted to work in the UK in accordance with the provisions of the Asylum and Immigration Act 1996. You will be asked to provide evidence of your entitlement to work in the UK if you are successful and an offer of employment is made. Please note that Citizens Advice Stevenage does not hold a sponsor license and, therefore, cannot issue certificates of sponsorship under the points-based system.

Health and Safety

It will be the duty of every employee while at work to take reasonable care for the health and safety of themselves and of other persons who may be affected by their acts or omissions at work.

References

All job offers are subject to the receipt of two satisfactory references: One should be from your current or most recent employer or line manager (if you are employed through an agency), or your course tutor if you have just left full time education. Both referees should be able to comment on your suitability for the role. References will only be taken up for successful candidates following interview.

Criminal convictions

Anyone who applies to work within Citizens Advice Stevenage will be asked to disclose details of unspent convictions during the recruitment process.

Having a criminal record will not necessarily bar you from working for Citizens Advice Stevenage – much will depend on the type of job you have applied for and the background and circumstances of your offence. However, we are not able to employ anyone with a conviction for a sexual offence against a child or vulnerable adult, regardless of when the offence took place. All other convictions will be considered on an individual basis.

Disclosure and Barring Service (DBS) disclosures are only requested where proportionate and relevant to the post concerned. If the post for which you are applying for requires a DBS disclosure, this will be noted in the application pack.

The duties and responsibilities listed above describe the post as it is at present. The post holder is expected to accept any reasonable alterations that may from time to time be necessary.

Addressing each point of the person specification

This is a key section of the application which allows you to provide evidence of your experience, knowledge, skills and abilities that are relevant to the role as described in the role profile. Selection is based on an assessment of the evidence you provide against the requirements of the role as set out in the person specification. It is important that you tailor your response to clearly demonstrate how you meet each requirement. No assumptions will be made about your achievements and abilities.

Please provide one example for each requirement. You should choose examples of past experience that clearly demonstrate what we are looking for, and be precise about what you did, how you did it and the outcome or result of your actions. Please try to limit your response to each criterion to a maximum of 200 words.

A useful guide might be S.T.A.R:

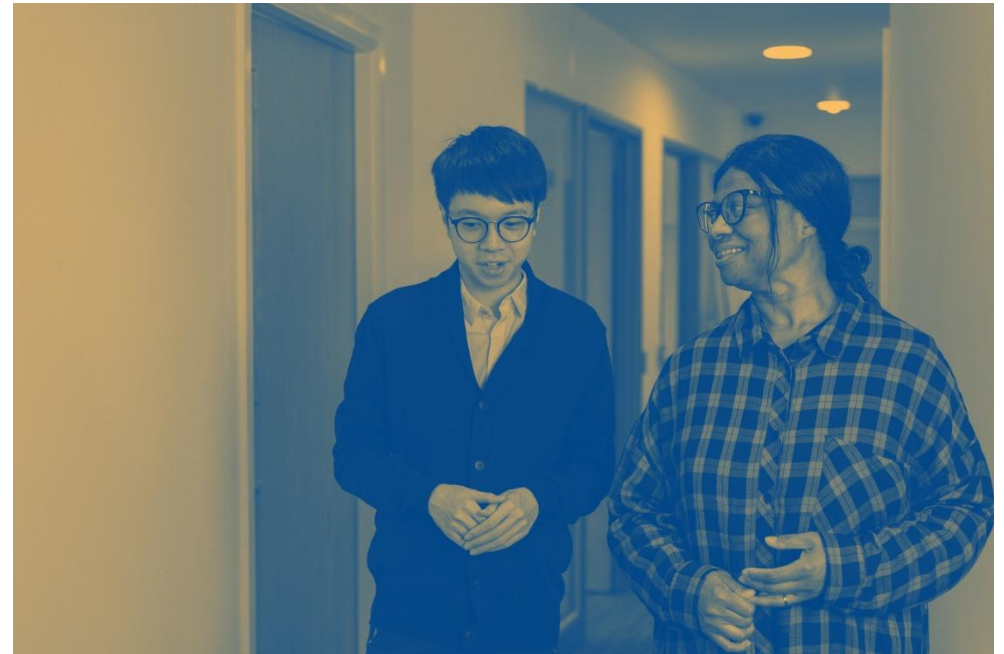
Specific – give a specific example

Task – briefly describe the task/objective/problem

Action – tell us what you did

Results – describe what results were achieved

Please provide recent work examples wherever possible. However, do remember that relevant examples from other aspects of your life, for example: voluntary or unpaid work, school or college work, family or home responsibilities, can also be given.





www.castevenage.org.uk

Candidate Briefing Pack

Registered charity number 1077414

Company number 03836105

