

Candidate information pack

Finance Officer

We must
keep on protecting
each other.



HANDS



FACE



SPACE

**citizens
advice**

Stevenage

cyngor ar bopeth
citizens advice
cyngor ar bopeth
citizens advice



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 Charlie Newman, Head of Advice 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.

Finance Officer

Reporting to: Head of Finance and Business Support

Department: Finance

Hours: Full time – 37.5 hours per week

Salary: £24,784.50 - £30,000 depending on experience.

Part time position may be considered for the right candidate

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 Citizens Advice Stevenage, the **Finance Officer** will support the effective financial management of the charity by ensuring the accurate processing of financial transactions, maintaining financial records, assisting with reconciliations and reporting, and providing administrative support to the finance function.

The successful candidate will play a key role in ensuring financial information is accurate, timely and compliant with organisational policies, accounting standards and regulatory requirements. They will work closely with the Head of Finance and Business Support to support the smooth operation of the finance department and contribute to the overall financial health of the organisation.

Job Description

Invoice & Payment Processing

- Raise debtor invoices accurately and promptly, ensuring they are issued within agreed timescales.
- Support the accurate processing of supplier invoices, payments and employee expense claims.
- Prepare and process BACS payment runs in accordance with financial controls and approval procedures.
- Maintain accurate records of all financial transactions and supporting documentation.
- Ensure invoices and payments are coded correctly within the accounting system.

Financial Reconciliation & Record Keeping

- Reconcile bank statements and ledger accounts on a regular basis, investigating and resolving any discrepancies.
- Reconcile all income sources, ensuring supporting documentation enables accurate bank reconciliation within the accounting system.
- Assist in maintaining schedules for deferred income, accruals, prepayments, payroll and other balance sheet reconciliations.
- Maintain organised and accurate filing systems for financial documentation.
- Assist in maintaining accurate financial records and ensure documentation is complete and audit ready.

Reporting & Month-End Activities

- Support the finance team in meeting month-end and year-end reporting deadlines.
- Assist with month-end and year-end closing activities, including reconciliations and journal processing.

- Support the preparation of management accounts and associated financial reports.
- Assist with the accurate preparation and submission of financial returns to National Citizens Advice.
- Provide financial information and reports as requested.

Administration & Stakeholder Support

- Respond professionally and promptly to finance-related enquiries received by email, telephone and in person.
- Maintain up-to-date departmental documentation, including Standard Operating Procedures (SOPs).
- Work collaboratively with the Head of Finance and Business Support to ensure compliance with accounting principles, financial controls and organisational policies.
- Develop positive working relationships with colleagues, suppliers and external organisations.

Other Duties / Responsibilities

- Undertake any other duties appropriate to the level of the role and the operational needs of Citizens Advice Stevenage.
- Contribute positively to the continuous improvement of finance processes and procedures.
- Comply with all organisational policies, including confidentiality, GDPR, health and safety, safeguarding, equality, diversity and inclusion.
- Promote and uphold the aims, values and reputation of Citizens Advice Stevenage at all times.

Person Specification | What you need to do this job

Essential

- A good understanding of accounting principles and financial practices.
- Previous experience working within an accounts or finance role.
- Experience processing invoices, payments and bank reconciliations.
- Experience using accounting software.
- Strong Microsoft Office skills, particularly Microsoft Excel.
- Excellent attention to detail with a high level of numerical accuracy.
- Strong organisational skills with the ability to manage workloads and meet deadlines.
- Excellent written and verbal communication skills.
- Ability to work independently and collaboratively as part of a team.
- A proactive approach to problem solving with the ability to identify and resolve issues.
- A positive, flexible and outcome-focused attitude.
- Ability to maintain confidentiality and handle sensitive financial information appropriately.
- Commitment to the aims, values and principles of Citizens Advice, including equality, diversity and inclusion.

Desirable

- A recognised accountancy qualification such as AAT (or working towards one).
- Experience supporting month-end and year-end accounting processes.
- Experience preparing management accounts and financial reports.
- Experience working within the charity or not-for-profit sector.
- Knowledge of National Citizens Advice financial reporting requirements.
- Experience maintaining finance procedures and Standard Operating Procedures (SOPs).

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

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Company number 03836105

