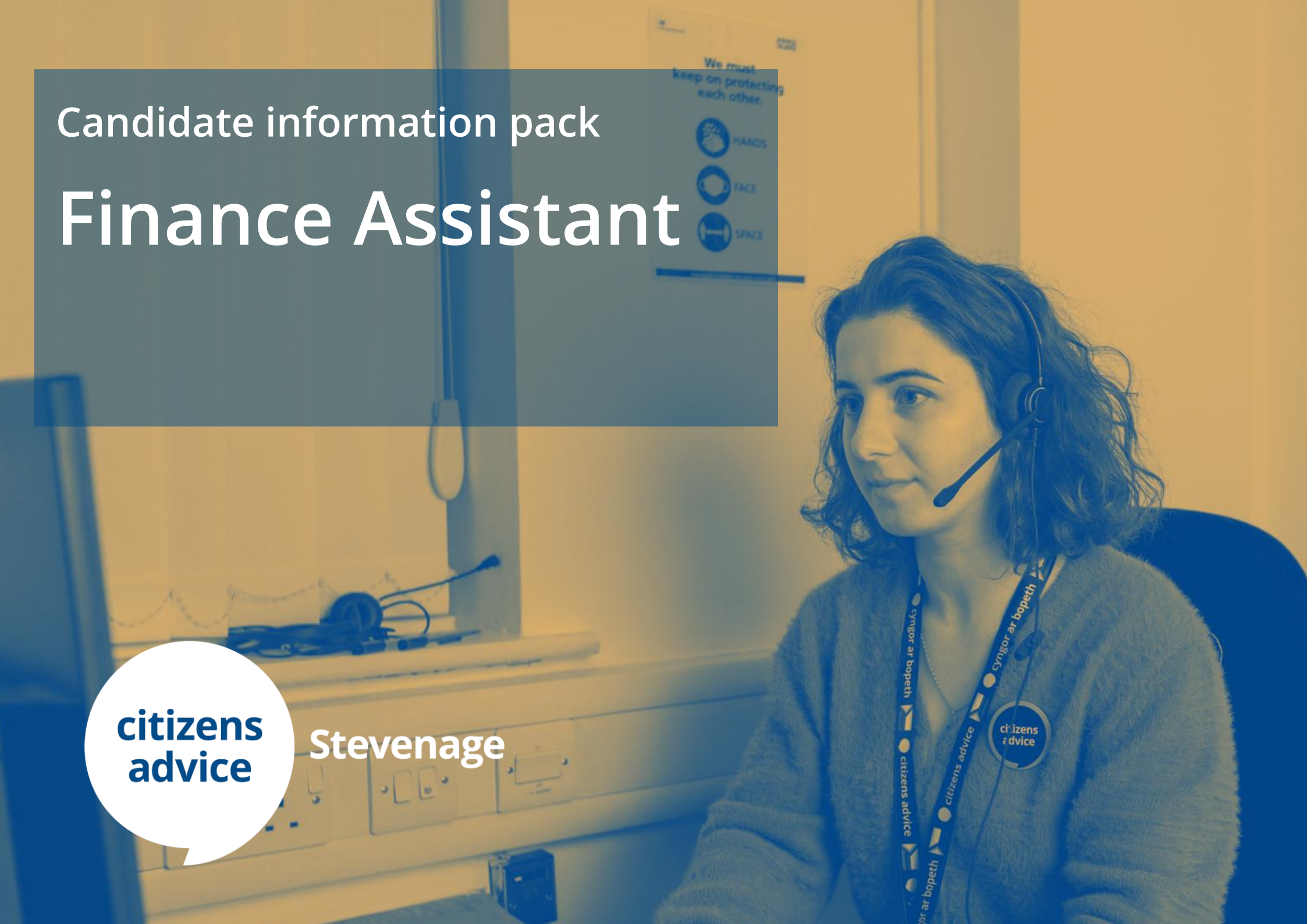


Candidate information pack

# Finance Assistant

**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](mailto: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 Assistant

**Reporting to:** Head of Finance & Business Support

**Department:** Finance and Business Support

**Hours:** 22.5 across 3-5 days

**Salary:** Up to £18,000.00 per annum, dependent on qualifications & experience.

**Holidays:** 27 days plus bank holidays pro rata

**Location:** Office in Stevenage. Hybrid working by arrangement post probation

## Purpose of the Job

Working within the aims, policies and principles of the Citizens Advice Service to Process invoices, payments and expense reports in an accurate and timely manner Reconcile bank statements and ledger accounts monthly Support month-end and year-end closing processes.

# Job Description

## Invoice and Payment Processing

- Raise debtor invoices as required, ensuring accuracy and timely distribution
- Support accurate processing of invoices, payments, and expense claims
- Prepare and manage payments through BACS, adhering to financial controls

## Financial Reconciliation and Record-Keeping

- Reconcile bank statements and ledger accounts on a regular basis
- Reconcile all income sources, ensuring documentation supports efficient bank reconciliation in the accounts package
- Assist in maintaining schedules and reconciling deferred income, expenses, accruals, prepayments, and payroll
- Maintain accurate and organized filing systems for financial documents
- Assist in the preparation and maintenance of financial records

## Administrative and Stakeholder Support

- Respond to email, telephone, and in-person queries professionally and promptly
- Maintain up-to-date documentation for departmental processes, including standard operating procedures (SOPs)
- Collaborate with the Head of Finance to ensure compliance with accounting principles and organizational policies

## General Responsibilities

- Undertake any other tasks and responsibilities commensurate with the role and the needs of Citizens Advice Stevenage

## **Person Specification** | What you need to do this job

### **Essential:**

- Formal accountancy qualification (e.g. AAT)
- A good understanding of accounting principles and practices
- Previous experience in an accounts or finance role
- Proficiency in MS Office, especially Excel
- Familiarity with accounting software
- Excellent communication and interpersonal skills
- Ability to work independently and as part of a team
- A pro-active approach to work and problem solving, and the ability to spot and deal with issues as they occur - essential
- A 'can do' outcome focused attitude and approach

### **Desirable :**

- Strong attention to detail, accuracy and organizational skills

### **Key Accountabilities, Responsibilities and Tasks**

#### **Communication**

- Consistent and effective communication with all members of the team and all visitors to the charity

#### **Internal and External Contacts**

- All employees, volunteers and trustees
- Members of the public.
- External organisations/suppliers

## **Decision Making**

- Freedom to make decisions within the boundaries of the Job Description and charity policy and procedure

## **Mental and Physical Consideration. Working Conditions & Environment**

- The post holder may be required to change from one activity to another to meet the changing needs of the service.
- Required to sit at a computer.
- The post holder will be required to work in a high volume, fast paced environment.
- Frequent interruptions should be expected.

## **Health and Safety**

- Understand and comply with all Health and Safety, Fire and Control regulations
- Complete all mandatory training and ensure compliance of direct reports and contractors
- Report any accidents or incidents in the department

## **Safeguarding**

- Act in a manner always to safeguard the interests of our clients and justify public trust and confidence in Citizen Advice Stevenage

## **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](mailto: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](http://www.castevenage.org.uk)

**Candidate Briefing Pack**

Registered charity number 1077414

Company number 03836105

