



# Finance & IT Manager

## Job pack

Thanks for your interest in working at Citizens Advice Bournemouth Christchurch & Poole. This job pack should give you everything you need to know to apply for this role and what it means to work at Citizens Advice.

In this pack you'll find:

- Our values
- 3 things you should know about us
- Overview of Citizens Advice and Citizens Advice BCP
- The role profile and personal specification
- Terms and conditions
- What we give our staff

Want to chat about this role?

If you want to chat about the role further, you can contact Dan Stannard by emailing [dan.stannard@citizensadvicebcp.org.uk](mailto:dan.stannard@citizensadvicebcp.org.uk)

Closing date for applications: 9am on Friday 16<sup>th</sup> May 2025

## Our values

We're inventive. We're not afraid of trying new things and learn by getting things wrong. We question every idea to make it better and we change when things aren't working.

We're generous. We work together, sharing knowledge and experience to solve problems. We tell it like it is and respect everyone.

We're responsible. We do what we say we'll do and keep our promises. We remember that we work for a charity and use our resources effectively.

## 3 things you should know about us

1. We're local and we're national. We have 6 national offices and offer direct support to people in around 260 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.

# How Citizens Advice Bournemouth Christchurch & Poole works

Every year thousands of people come to us for advice and help with solving their problems.

We're here for everyone and help with problems like managing debt or household bills and understanding rights at work or housing issues. We also provide specialist services in welfare, benefits and debt.

Our projects include Macmillan Cancer Support, Pension Wise, Immigration support, Hate Crime, multiple specialist Benefits and Debt services.

We're an important part of this community, with 4 offices across Bournemouth, Christchurch and Poole, where people need us.

Through our daily interaction with clients, we have a credible understanding of local needs. We use our data and insight to tailor our services, as well as help improve policies and practices locally.

Putting our client's needs at the heart of decision-making means we also work in partnership, making it easier for clients to access relevant services.

We're also part of the Citizens Advice service. This means we share knowledge and best practice so that people can expect a quality service.

Together we work to fix the underlying causes of people's problems using evidence gathered from across our network. Because of this, we save society money.

Last year we helped people with over 47,000 issues through face-to-face, telephone and webchat.

# Overview of Citizens Advice

The Citizens Advice service is made up of Citizens Advice - the national charity - and a network of around 260 local Citizens Advice members.

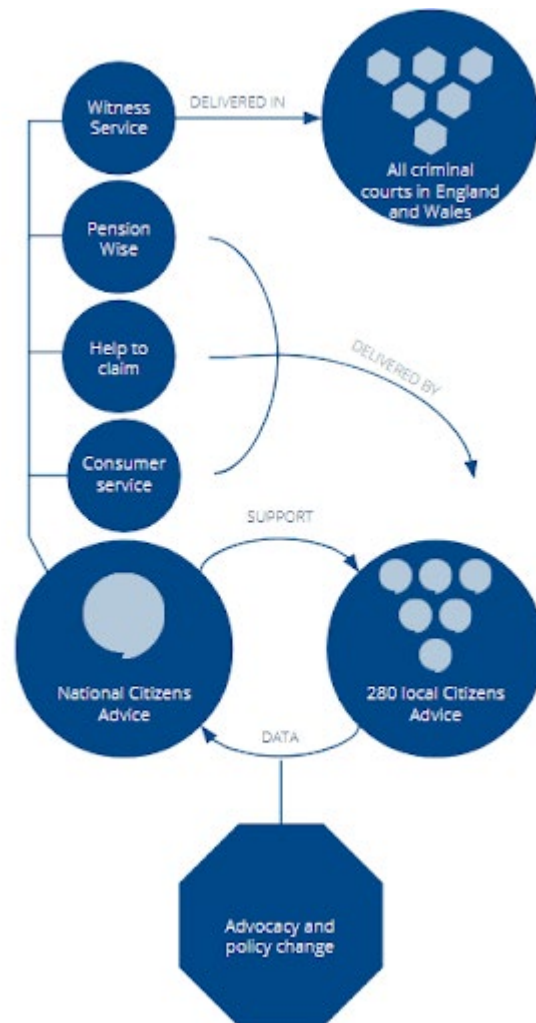
This role sits our network of independent charities, delivering services from

- over 600 local Citizens Advice outlets
- over 1,800 community centres, GPs' surgeries and prisons

They do this with:

- 6,500 local staff
- over 23,000 trained volunteers

Our reach means 99% of people in England and Wales can access a local Citizens Advice within a 30-minute drive of where they live.





## The role

The primary purpose of the post is to ensure sound financial management and efficient IT operations to the Charity. To ensure that accurate and timely financial information is maintained and is available to the Chief Officer (CO), other senior managers and the Board of Trustees.

The post of the Finance & IT Manager is a critical role within Citizens Advice Bournemouth Christchurch & Poole (CABCP) and the post holder will be responsible for the day-to-day financial management of the organisation and will be involved in maintaining the financial procedures and systems, producing budgets and management accounts for a variety of needs, and ensuring accurate and timely financial recording on QuickBooks. The postholder will also oversee the IT infrastructure.



## Role profile

### Financial Accounting

The post holder will be pivotal in ensuring proper financial management is maintained in line with accounting standards, internal procedures, legal and Citizens Advice membership requirements.

- Ensure accurate financial records are kept in line with the financial processes as set out in the Finance procedures Manual
- Working with the Finance Assistant, ensure finance administration is processed and kept up to date in accordance with the Finance procedures Manual.
- Ensure that all income and expenses are duly authorised, received/paid and properly recorded in a timely manner.
- Supervise and reconcile charity cheque payment system on behalf of clients.
- Carry out periodic reconciliation of bank, cash, investment, payroll and other control accounts, ensure these are properly recorded and authorised by the CO/DCO and ensure all reserves are correctly reconciled and report any anomalies to the DCO.
- Oversee periodic invoices and funder returns to receive all monies due, liaising where necessary with project managers, fund holders and other relevant parties to ensure all relevant information has been supplied in a timely manner.
- Lead the preparation for the annual year-end Audit/Independent Examination. Be the primary contact for the auditors in resolving audit related queries.

## Financial Reporting

- Lead the preparation of periodic reports, including quarterly management accounts for the CO, Finance committee and the Board of Trustees.
- Be a point of call for the Treasurer and the Finance committee as and when required in ensuring the financial wellbeing of the Charity.
- Work closely with the CEO, DCO and other Senior Managers in the production of annual and project based budgets for organisational needs, to provide financial information to support funding applications and to contribute to the key task of income generation.

## Financial Management

- Manage insurance arrangements and service level agreements. Ensure these are kept up to date and all relevant paperwork has been duly submitted and filed.
- Support the DCO with governance related matters, including attending the Finance committee and other committees as required.
- Ensure CABCP's financial policies and procedures are adhered to and contribute to their annual review.
- Ensure that the financial affairs of CABCP comply with all legal requirements and be aware of and apply new legislation as necessary.
- Maintain the safekeeping and control of the cash and bank transactions ensuring security, loss prevention and optimising cashflow and work with the CO to manage investments as agreed by the Finance committee.
- Support the DCO in the processing of the monthly payroll through the external providers
- To undertake any payroll-related tasks as delegated by the CO/DCO.

## IT Infrastructure Management

- Maintaining and supporting the charity's IT systems, including hardware, software, and networks.
- Ensuring data security and backup procedures.
- Managing IT budgets and procurement.
- Providing technical support to staff and volunteers.
- Managing relationships with external IT suppliers.
- Implementation of new IT systems and upgrades.
- Ensuring compliance with data protection regulations (GDPR).
- Managing the charity's databases and information systems.
- Work with the DCO to developing and implementing data management policies and procedures.

- Supporting the charities digital strategy.
- Oversee cybersecurity measures to protect the charity's data and systems.
- Conducting regular security audits and risk assessments.
- Training staff on cybersecurity best practices.

#### Professional development

- Keep up to date with new legislation and changes that have an impact on the organisation's operations (e.g. salary changes, pay awards, increments, changes in tax, NI and pensions re auto-enrolment).
- Keep up to date with developments in computerised accounting systems and other relevant information technology.
- Attend appropriate training as necessary

#### General

- Comply with the aims, objectives and values of CABCP.
- Participate positively and proactively in supervision sessions, team-meetings and organisation-wide activities.
- Contribute to the smooth running of the Office and supervise any volunteers under direct management.
- Actively promote and implement the equal opportunities policies of the organisation.
- Carry out duties which are generally compatible with the functions of the post as required from time to time.
- Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.
- Ensure all data protection requirements are adhered to in all work for which the post holder is responsible.



## Person specification

1. High level of numeracy, a good understanding of Microsoft Office and, in particular, an advanced user of Excel.
2. Experience of using of computerised accounting packages, preferably Quick Books.
3. Experience of supporting financial management in a charity or similar organisation, with experience of managing own workload, meeting deadlines and setting priorities.
4. Ability to produce reports for a variety of requirements, including trial balance, management accounts and statutory accounts.
5. Experience of producing budgets and monthly management information.
6. Demonstrate an understanding of payroll processing and HMRC requirements.
7. Have an understanding of the preparation of annual accounts and year end audits.
8. Be accurate, pay attention to detail and have a systematic approach.
9. Recognised qualification in Accountancy (e.g., ACCA, CIMA, ACA.)
10. Experience of managing IT systems and infrastructure.
11. An understanding of, and the ability to establish, controls and processes to ensure the safe keeping of the financial resources of the organisation.
12. Ability to produce clear and concise written financial reports together with the ability to explain financial information clearly and concisely to people with little financial knowledge.
13. Self-reliant with an ability to independently problem solve, yet be aware of own limitations and know when to seek help.
14. Clear understanding of confidentiality and data protection principles.
15. A 'can do' attitude.
16. Ability to communicate effectively, both orally and in writing with people from a range of backgrounds, including external contacts.
17. Ability to work calmly under pressure; have a flexible approach to work and capable of working independently or as part of a team.
18. Be at all times a positive ambassador for CABCP with the ability to commit to, and work within the aims, objectives and values of CABCP.
19. Commit to ensure that work undertaken reflects and supports CABCP's equality and diversity strategy.

In accordance with Citizens Advice national policy, we may ask the successful candidate to be screened by the DBS. However, a criminal record will not necessarily be a bar to your being able to take up the job.





## Terms and conditions

Salary: £35,000 per annum

Hours: Full Time – 37 hours per week

Holidays: 25 days + Bank Holidays



## What we give our staff

We offer ongoing training and support, generous annual leave, access to online health/wellbeing resources, an Employee Assistance Programme and employers pension contributions.