



# Finance Officer - part time

## Job pack

Thanks for your interest in working at Citizens Advice Wokingham. 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 Wokingham.

In this pack you'll find:

- Our values
- 3 things you should know about us
- Overview of Citizens Advice and Citizens Advice Wokingham
- 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 Jake Morrison, Chief Executive by emailing [jake.morrison@citizensadvicewokingham.org.uk](mailto:jake.morrison@citizensadvicewokingham.org.uk) or calling 0118 978 7258

## Our values

**We encourage** - we're not afraid of trying new things and we support each other to figure it out. We question every idea to make it better and we change when things aren't working.

**We're approachable** - we work together with stakeholders and partners to find the best way forward for our clients. We ensure that our services reach those who need us.

**We're confident** - 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 the Citizens Advice service

**1. We're local and we're national.** We have 6 national offices and offer direct support to people in around 300 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 Wokingham works

In 2020 to-date (early September) we have helped over 4,200 clients in Wokingham Borough find a way forward. This is nearly double the amount we helped in the whole of 2019. Our small team of paid staff and large volunteer team do a brilliant job supporting our communities, and supporting the charity to thrive.

Our local charity is at a really important crossroads - in our 43 year existence in Wokingham, you can argue we've never been more needed in terms of demand.

Our One Front Door has been a huge success, ensuring that people can get the help they need, when they need it - answering 97% of calls each month since April, within seconds.

You can find out more details about our charity at [www.citizensadvicewokingham.org.uk](http://www.citizensadvicewokingham.org.uk) and a copy of our business plan is available upon request.

## Overview of Citizens Advice

The Citizens Advice service is made up of Citizens Advice - the national charity - and a network of around 300 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

**Salary:** up to £23,460 pro rata, dependant on experience + 10% pension

**Hours:** 8 hours per week

**Contract:** Fixed term until 31st March 2021, with potential extension

**Location:** Waterford House, Erfstadt Court, Wokingham, RG20 2YF and potential for some home working

**Reports to:** Chief Executive

We're now looking for an organised and reliable Finance Officer with great problem solving skills to play a crucial role in helping us carry out our work. You will help us ensure that our finances are in order. Working closely with our volunteer bookkeeper, trustee board treasurer and Chief Executive, you will take the lead on all things finance related.

You will be joining a small and dedicated team, based in Wokingham town centre, but currently most of our team are working remotely from home. We would like this role to be based in our office whenever possible.

This role will be key in ensuring we receive the funds which we have secured, to provide the support services our communities need, as well as ensuring we meet all of our financial obligations.

This will include:

- processing updated payroll information to our outsourced provider,
- handling new starters finance information and pension enrollment
- paying invoices, creating invoices and paying in cheques
- processing staff and volunteer expenses
- Leading on and monitoring our funder tracker document
- Work with and assist in collecting the information required by our volunteer bookkeeper and treasurer to enable the preparation of management accounts
- Work with the Chief Executive on preparing information in connection with preparation of annual budgets



## Role profile

### Administration

- Create and maintain filing systems in accordance with the organisations systems and procedures
- Update the Electronic information system, hard copy information system and other reference materials including Citizens Advice

## **Finance**

- Authorise invoices within predetermined limits
- Make payments from petty cash within predetermined limits
- Reconcile petty cash and prepare statements
- Make and record payments going out and record and bank payments coming into the organisation

## **Correspondence**

- Use of photocopier, fax and other machines as appropriate
- Answer the telephone, refer calls or take messages
- Manage emails
- Maintain and organise diary and work records
- Produce information from spreadsheets and database
- Word process letters, documents and reports as required - using Google Suite and other systems



# **Person specification**

## **Essential Criteria**

- Ability to write clearly and accurately, communicate effectively face to face and on the phone
- Ability to systematically manage a varied workload, prioritise and meet deadlines under pressure
- Ability to maintain efficient administration systems with attention to detail and demonstrable ability to maintain accurate, up to date records
- Numeracy skills and the ability to work within established financial systems
- Ability to take a brief, ensure the task is understood and then work independently

## **Desirable Criteria**

- Ability to handle payroll matters

In accordance with Citizens Advice national policy we will may 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.



## What we give our staff

In 2019, 98% of our staff and volunteers said they would recommend this as a place to work or volunteer, and we'd love for you to join us.

We are supported by a local Training Manager who will happily speak to you about any requirements.

All of our staff are signed up to the LifeWorks Employee Assistance Program, all staff, volunteers and trustees are also signed up to TogetherAll for support with mental health and wellbeing.

## How to apply

Please email [admin@citizensadvicewokingham.org.uk](mailto:admin@citizensadvicewokingham.org.uk) with your application, or if needed, post to our Waterford House address.

Please apply via CV and cover letter, with your cover letter ensuring that your application outlines your experience and understanding of each of the person specification criteria.

We look forward to receiving your application. Please do contact us if you have any questions.

Citizens Advice Wokingham values diversity, promotes equality and challenges discrimination. We encourage and welcome applications from people of all backgrounds.

For more information on the work we do, visit our website [www.citizensadvicewokingham.org.uk](http://www.citizensadvicewokingham.org.uk)