



Working with us:

Head of Finance

Job Pack – September 2023



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A note from our CEO, Derek Mitchell

“Thank you for your interest in joining the Citizens Advice Scotland team. Our employees play a critical role in helping to make society fairer, and in supporting our network of Citizens Advice Bureaux across Scotland.

We hope this pack will give you the information you need to decide if a role with us is right for you. We rely on each member of the team to bring their own unique skills, experience, views and commitment to our goals – it’s that combination which makes our organisation what it is.

The Citizens Advice network in Scotland provides much-needed advice and information to people of all walks of life, on a huge range of issues. We give a piece of advice every 19 seconds – face to face, online and by phone. The services we and our members provide make a difference in communities across Scotland and the rest of Great Britain, ensuring people are aware of their rights. It’s a powerful thing to be part of.

We look forward to hearing from you if you decide to apply, and to learning more about what you can bring to this role, and to the team.”



Derek Mitchell, CEO
Citizens Advice Scotland



About The Citizens Advice Network in Scotland

Scotland's Citizens Advice Network empowers people in every corner of Scotland through our local bureaux and national services by providing free, confidential, impartial and independent advice. We use people's real-life experiences to influence policy and drive positive change. We are on the side of people in Scotland who need help, and we change lives for the better.

The Citizens Advice network is made up of 59 local bureaux, each its own independent charity, the Extra Help Unit, a group of specialist case workers dealing with energy advice, and Citizens Advice Scotland as the membership body itself. We provide advice across over 200 locations and deliver 12 national advice projects for UK and Scottish Government including the Money Talks advice service and the Help to Claim Universal Support advice service. We are a multi-channel service, offering people free, confidential and impartial advice in a manner that suits them – whether that is over the phone, online or face to face in bureaux themselves.

Last year the network helped nearly 180,000 people and unlocked £147million for people through things like social security payments and employment entitlements. Our online advice received over 5.4million page views and our awareness raising campaigns reached millions of people.

Citizens Advice Scotland is committed to promoting diversity and inclusion. We offer a range of family friendly, inclusive employment policies and flexible working arrangements to support all our staff. We are also committed to equality of opportunity for all and applications from individuals are encouraged regardless of age, disability, sex, gender reassignment, sexual orientation, pregnancy and maternity, race, religion or belief and marriage and civil partnerships.

Find out more at www.cas.org.uk.

Employee Benefits

Our people are our greatest strength and make Citizens Advice Scotland a great place to work. We place our people at the forefront of everything we do, and we offer a wide range of benefits to show how much we value everyone who works for us.

Work-life balance



- > **35 hour full time working week**
- > **Flexible working opportunities for everyone**
- > **Flexitime system**
- > **Blended/Hybrid Working**
- > **Generous leave:** 30 days annual leave + 10 days public holiday

Health and wellbeing



- > **Occupational Sick Pay:** up to 6 months full pay and 6 months half pay dependant on length of service
- > **Life Assurance Scheme:** financial security and reassurance for employees and their families.
- > **My Gym Discounts:** join gyms, health clubs, leisure centres, yoga studios, boot camps and outdoor activities at a discounted rate.
- > **Annual On-site Employee Health Checks**
- > **Employee Counselling Service**

Financial benefits



- > **Pension scheme:** save for your future with an 8% employer and 4% employee contribution.
- > **Capital Credit Union:** access ethical financial services with a credit union membership.
- > **Independent Financial Advice**
- > **Access to Employee Benefits/Discounts:** including special offers, discounts and deals from over 200 suppliers

Other benefits



- > **Generous Maternity, Adoption and Paternity Pay**
- > **Enhanced occupational Sick Pay**
- > **Family Friendly Policies and Support**
- > **Season ticket loans:** take out an interest-free season ticket loan to save on travelling to and from work
- > **Salary sacrifice schemes:** Various schemes including Cycle to Work and Home Technology schemes.
- > **Paid time off to volunteer**
- > **Learning and Developing Opportunities for all**

About the role

- > **Job title:** Head of Finance
- > **Location:** Edinburgh or Glasgow office with options for blended working
- > **Hours per week:** 35
- > **Type of contract:** Permanent
- > **Job Level and Salary Scale:** Level 7, £46,314 - £56,606 per annum*, commensurate with experience

*The successful candidate's salary will be determined in line with their skills and experience. New employees are normally appointed at the lower end of the salary scale and potential candidates should not expect to be appointed above the midpoint of the salary scale.

- > **Closing date:** 24 September 2023
- > **Interviews:** w/c 2 October 2023

About the job

The Head of Finance role will drive forward our ambitious financial Strategy and help us to ensure that we have the funding we need to continue to deliver vital local services to bureaux in communities across Scotland.

As mentioned earlier, last year we helped nearly 180,000 people and we want to help even more people this year. That's where you come in. The new Head of Finance will help us make the right financial decisions to navigate the challenging financial landscape that charities face at this time and maximise the support that Citizens Advice Scotland can provide to bureaux and citizens across Scotland. Our bureaux and clients need our help more than ever and you will play a critical role in ensuring that Citizens Advice Scotland can meet that demand through effective financial management and developing new and innovate approaches to ensuring financial stability.

We work with over 24 Budget Holders managing more than 40 projects, as well being responsible for the day-to-day financial running of Citizens Advice Scotland and the annual and statutory financial procedures.

As the Head of Finance, you will lead and support Citizens Advice Scotland to maximise the outcomes it delivers to bureaux and Citizens from available funding. You will work with Senior Leadership colleagues across the business to deliver on the Citizens Advice Scotland Strategy through the development of sound financial modelling to support identified new and ongoing business opportunities.

You will work with Executive Leadership team and Risk Audit and Finance Committee to oversee the financial viability of Citizens Advice Scotland and ensure the ongoing and appropriate management of all funding. You will lead the Finance department in the maintenance and development of systematic and effective processes for financial control and review.

Our Strategy – Funding and Income

The Citizens Advice Service in Scotland is in the process against our new strategy a key strand of which is achieving sufficient funding and income to sustain services to bureaux in communities across Scotland.

As Scotland's largest and most trusted advice provider we know that people need our services more than ever and that the person centred, local, face to face service that we provide is the best way to help people. To continue to deliver this we need to ensure that we have sufficient funding to deliver these vital services. The Head of Finance will have a vital role in achieving this. Working closely with the Executive team and the Director of Business Development you will map out a financial strategy for the organisation which helps to ensure stability in our long-term financial position, using financial models to help us identify areas of funding risks and supporting the Business Development Director to identify and develop opportunities to bring in new funding to maintain and develop our services. In doing this you will recognise our values and ensure that we access funding and income in a way that aligns with our core values.

We have already started on this journey and are ready to move to the next chapter, key deliverables for the next year will be set with you but are likely to include.

- Developing our financial framework to oversee our multi-million-pound budget and ensure it maximises delivery of services.
- Working with the Business Development Unit to diversify and grow our collective income in a way that aligns with our values and delivers services to citizens.
- Leading on the upgrade of our accounts systems so that our processes are modern and efficient, reflect best practice and align with the business needs.
- Selecting and appointing new Auditors for 23/24 and working with them to develop and undertake the audit process to ensure the highest standard of accounting practices and financial management within the organisation.

How to apply

To apply for this role, please send completed copies of the **Personal Details Form**, along with your current **CV** to: recruitment@cas.org.uk

In addition, we ask you to provide a **written statement** with examples which demonstrate how you meet the requirements of the post, as set out in the job description and person specification.

Equality & diversity monitoring

To help Citizens Advice Scotland monitor equality and diversity statistics please return the Equality & Diversity Monitoring Form **separate** from your other application documents by emailing it to: equalitymonitoring@cas.org.uk



Job description

- > **Position:** Head of Finance
- > **Responsible to:** Deputy Chief Executive
- > **Line manager responsibility:** Yes
- > **Budget responsibility:** Yes

Key responsibilities

- > Responsible for senior level decision making in both day-to-day management and strategic direction of the Finance department.
- > Operate as an effective member of the senior leadership team and contribute to achieving organisational objectives.
- > Design and implement controls to protect the organisations assets and prevent any potential areas of fraud.
- > Prepare and deliver the operational audit plan.
- > Overall responsibility for developing Citizens Advice Scotland's financial strategy including oversight and development of the financial framework and alignment of the budget with the Citizens Advice Scotland strategy.
- > Lead on managing all financial affairs (ensuring the timely settlement of invoices, banking of income and prudent management of cash) and developing, documenting and implementing appropriate financial guidelines and procedures for Citizens Advice Scotland.
- > Oversee and manage the finance team accountants in the production of budgets, monthly management and annual accounts, and to ensure budget holders understand the financial information provided and work within the budgetary constraints and limits set by the Board.
- > Overall responsibility for the operation of and compliance with lease agreements, maintenance contracts, insurance policies, the maintenance of company cars, office equipment and changes to the Fixed Asset Register.
- > Responsible for monitoring and controlling the claiming of grants, donations and sponsorship from all sources and be aware of the responsibilities and regulations relating to these.
- > Provide accurate, timely and meaningful financial and management information, with the assistance of the Finance team and implement a best practice approach for financial accounting controls.
- > Overall accountability in ensuring that accounting procedures, accounts and reporting are compliant with the law, applicable accounting standards, and meet the needs of external Government Agencies or other funder's requirements.
- > Responsible for the payroll function and matters relating to PAYE and NI, and for putting in place the necessary controls and checks to ensure all employees are paid accurately and on time, working with our Payroll Bureaux provider.

- > Manage and develop the Finance team, ensuring they have the skills and capability and capacity required and lead them to achieve appropriate objectives and values as set by the organisational strategy.
- > Prepare relevant reports for the Risk Audit and Finance Ctte and the Board.

Accountability and Decision Making

- > Acts as the final line in expert advice and technical guidance on Finance matters within the organisation, providing technical guidance to the Executive Leadership Team (ELT), Risk Audit and Finance Ctte and Board on financial issues.
- > Statute, accounting standards and external audit place some limitations on action, but also many procedures, policies and guidelines which the job holder is responsible for creating.
- > Develop existing and implement new financial systems where appropriate.

Problem solving and Complexity

- > Able to solve complex operational and strategic issues through a pragmatic and commercially sound approach.
- > Solutions must be found within the constraints of the finance framework, but this can still allow considerable creativity and lateral thinking.
- > Will need to solve financial problems where no policy or procedure applies, or where the best way forward is not straightforward.
- > Problems may be high-profile financial issues which have wide ranging impacts.
- > Problems faced may not have been faced previously and will require assessing risk versus reward, including internal and external impact.

The above job description is not exhaustive and is clarified to include broad duties inherent in the post.

Person specification

Knowledge, skills and experience

Essential

- > CCAB/CIMA Qualified Accountant
- > Experience of leading and managing a finance department at a senior level, preferably within the charity sector.
- > Demonstrable experience working as a qualified accountant within a finance team.
- > Experience designing and introducing new financial systems and procedures.
- > Substantial and demonstrable financial knowledge and experience covering all major aspects of the finance functions.
- > Knowledge of UK law as it relates to the Finance function.
- > Experience and knowledge of financial and payroll systems.
- > Proven skills in influencing, communication and working collaboratively with stakeholders and employees at all levels.
- > Ability to evidence personal drive, innovation, confidence and commitment to engage others.
- > Resilient with flexibility and adaptability to self-manage and work on own initiative.

Desirable

- > Knowledge and experience of Scottish charity accounting under the OSCR regulatory framework would be desirable.

www.cas.org.uk



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The Scottish Association of Citizens Advice Bureaux – Citizens Advice Scotland. Scottish charity (SC016637) and company limited by guarantee (89892)