

WEST DUNBARTONSHIRE CITIZENS ADVICE BUREAU

FINANCE AND RESOURCE OFFICER

ABOUT THE ROLE

Job Title: Finance & Resource Officer

Responsible to: Chief Executive Officer (in their absence, Senior Operations Manager)

Location: Dumbarton

Hours per week: 35 hours per week

Type of Contract: Full-time permanent post

Salary: £27,038

Closing Date: Noon Friday 4th April 2025

Interviews: Week Commencing 21st April 2025

JOB DESCRIPTION

1. Summary of Main Responsibilities

This new role will provide vital support to West Dunbartonshire Citizens Advice Bureau (WDCAB) and contains responsibilities for developing and maintaining robust financial and administrative systems and ensuring the smooth operation of our services. The Finance and Resource Officer will be a highly motivated, highly organised and ambitious individual with a passion for the aims of the Citizens Advice Bureau (CAB). They will work in a way which will support the changing needs of residents, building on WDCAB's strong and successful track record of local service delivery.

Financial management is at the core of the role, ensuring the responsible administration of income and expenditure in line with statutory and best practice monitoring and reporting requirements. The Officer will also be responsible for Human Resource (HR) administration and overseeing the ongoing development and review of policies and procedures for the organisation.

We are looking for a candidate with a finance background who would welcome a role with a wider scope and the opportunity to be involved in a diverse range of tasks and challenges for an ambitious and successful local charity

2. Finance

- ❖ Being accountable to the Chief Executive Officer (CEO) and Finance Subcommittee (FSC) for all financial systems, working collaboratively to ensure that all finances are properly administered and monitored
- ❖ Overseeing the allocation of invoices and management fees, the payment of invoices and salaries and the accurate recording of expenditure
- ❖ Monitoring and recording all project income and expenditure and adhering to financial reporting obligations in relation to funding, grants, contracts and other initiatives
- ❖ Providing management accounts and budget reports as required.
- ❖ Preparing and reviewing budgets in liaison with the CEO and Treasurer
- ❖ In conjunction with the CEO and Senior Operations Manager (SOM) prepare funding applications in line with WDCAB's development plans, from the initial stages through to completion, ensuring effective monitoring systems are in place.
- ❖ Acting as a signatory and authorising expenditure within pre-determined limits

3. Governance & Compliance

- ❖ Being the principal contact for Office of the Scottish Charity Regulator (OSCR), the Information Commissioner (ICO) and the Financial Conduct Authority (FCA), to ensure that reporting requirements are fully met and statutory returns are completed
- ❖ Overseeing the ongoing development and review of policies and procedures for the organisation
- ❖ Making arrangements for the Annual General Meeting and ensuring that all procedures are adhered to as required by the Bureau's constitution
- ❖ Arranging and attending Board Meetings if required, ensuring the timely distribution of relevant documents.
- ❖ Preparing papers and attending and producing minutes for the Finance Sub-Committee

- ❖ Supporting Board Members' understanding of policy, procedures and best practice where necessary
- ❖ Ensuring adherence to legal and regulatory standards as well as consideration of best practice in relation to all aspects of this post
- ❖ Keeping abreast of the latest developments in best practice in the field of governance and finance and advising the CEO, Governance and Risk and Finance Sub-Committees as necessary

5. Human Resources

- ❖ Maintaining accurate staff records and co-ordinating staff appraisals and support and supervision practices
- ❖ Administering the Bureau's annual leave processes
- ❖ Supporting the CEO with HR issues including liaising with CAS HR for advice and guidance and taking minutes at HR-related hearings and ensuring paperwork is effectively administered

6. Facilities and Administration

- ❖ Undertaking general office administration
- ❖ Conduct regular surveys including client satisfaction surveys, client profile surveys and stakeholder surveys, using a variety of channels.
- ❖ Collect, analyse, interpret and report on the data captured from these surveys.
- ❖ Managing our Information and Communication Technology (ICT) inventories
- ❖ Liaising with CEO on office maintenance and repairs
- ❖ Ensuring that the Bureau has effective document control
- ❖ Coordinating the production of the Bureau's Annual Report

7. Other

- ❖ Participating in continuous professional development to ensure skills and knowledge are sufficient to carry out the role
- ❖ Undertaking any other work, consistent with the purpose of the post and/or the aims of the Bureau, as directed by the CEO and the Board of Trustees

The above job description is not exhaustive and is clarified to include broad duties inherent in the post as reasonably requested by the CEO

PERSON SPECIFICATION

1. Essential

- ❖ Demonstrable experience working within a finance setting
- ❖ Substantial and demonstrable financial knowledge and experience covering all major aspects of the finance functions
- ❖ Experience and knowledge of financial systems including software
- ❖ Strong written and verbal communication skills
- ❖ Proven skills in influencing and working collaboratively with stakeholders and employees at all levels
- ❖ Ability to evidence personal drive, innovation and confidence
- ❖ Resilient, with flexibility and adaptability to self-manage, work on own initiative and to meet the needs of the service
- ❖ Strongly aligned to the values and principles of the Citizens Advice Bureau service

2. Desirable

- ❖ Experience of designing and introducing new financial systems and procedures
- ❖ Knowledge and experience of Scottish charity accounting under the OSCR regulatory framework
- ❖ Knowledge and experience of HR administration practices