

# Shetland Islands Citizens Advice Bureau



## Finance and Resource Manager

### Applicant Information Pack

**Thank you for your interest in our vacancy!**

#### Our Vision:

To ensure that individuals do not suffer through lack of knowledge of their rights and responsibilities or of the services available to them, or through an inability to express their needs effectively and equally

To exercise a responsible influence on the development of social policies and services, both locally and nationally



## About the role

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- > **Job Title:** Finance & Resource Manager
- > **Responsible to:** Bureau Manager
- > **Location:** Shetland Islands Citizens Advice Bureau, Market House, 14 Market Street, Lerwick ZE1 0JP
- > **Hours per week:** 35 hours per week
- > **Type of Contract:** Full-time permanent post
- > **Salary:** £40,698 to £43,742 per annum
- > **Benefits:** 6% employer pension contribution; 36 days annual leave
- > **Closing Date:** Noon Friday 14<sup>th</sup> March 2025
- > **Interviews:** Week Commencing 24<sup>th</sup> March 2025

## About us

We deliver free, confidential, impartial and independent advice to the people of the Shetland Islands. We advocate to improve lives through social policy.

Shetland Islands Citizens Advice Bureau (SICAB) is a member of the Scottish Association of Citizens Advice Bureaux (CAS). As a member of CAS, we benefit from a range of shared services giving us access to external expertise for support with HR, communications, data protection and training. Our Board of Directors oversees the governance of the charity.

Our principal funders are the Shetland Charitable Trust and Shetland Islands Council. We deliver a number of services on behalf of Citizens Advice Scotland and regularly secure a range of external funding to develop projects to meet local need.

## Why work with us

We support over 1500 clients annually and achieve an annual client financial gain of over £1million.

Our team of staff and volunteers are our greatest strength and make SICAB a great place to work. Work/life balance is as important to us as it is to you and our working practices support this as much as possible. We strive to have a work environment where staff thrive in their roles, and ensure that staff have all the tools and learning opportunities to carry out their roles enjoyably and to the best of their abilities.

We want SICAB to be a supportive, inclusive, and healthy workplace where mental, physical, and emotional wellbeing are prioritised, embedded in our culture, and sustained over time. Our wellbeing values (what we stand for) are guided by five principles: Person-centred; Empowering; Supportive; Inclusive; and Collaborative.

For more information about living and working in Shetland, see [www.shetland.org](http://www.shetland.org).

## About the job

We are seeking someone who believes in our work and is committed to our mission and values. Combining a caring and compassionate outlook with a driven and enthusiastic approach, you will enjoy a role at the heart of the organisation where your invaluable skillset will assure our future success.

This is a multi-faceted role: You will be an excellent finance manager who prides themselves on attention to detail and accuracy; you will be thorough and organised in supporting the resourcing of the organisation and driving its governance; you will want to bring your own experience to our processes and practices to develop efficient ways of working; and you will work closely with the Bureau Manager to assure our funding position and explore opportunities for service development.

## Employee benefits

SICAB offers excellent terms and conditions, including a total of 36 days leave and a pension scheme with a 6% employer contribution. Employees are able to access a free, independent and confidential counselling service. We are an inclusive employer considering flexible working arrangements where appropriate.

## How to apply

For further details and information on how to apply, please see [www.shetlandcab.org.uk/careers](http://www.shetlandcab.org.uk/careers). Please note that this post is subject to the disclosure of criminal history information.

## Equality & diversity monitoring

To help Shetland Islands Citizens Advice Bureau monitor equality and diversity statistics, please return the Equality & Diversity Monitoring Form separate from your other application documents by emailing it to: [della.armstrong@shetland.org](mailto:della.armstrong@shetland.org)

**Shetland Islands Citizens Advice Bureau is committed to equal opportunities both in service provision and in employment.**

**Charity number: SC019785**

**Charity name: Shetland Islands CAB Citizens Advice Bureau**

## Job description

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### 1. SUMMARY OF MAIN RESPONSIBILITIES

- > The Finance and Resource Manager is an essential role which assures robust management of the organisation, reporting to and working closely with the Bureau Manager. 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 role includes provision of Shetland Islands CAB bookkeeping and payroll service
- > You will also be responsible for HR and Operations administration, including overseeing the on-going development and review of policies and procedures for the organisation and the Board
- > We are looking for a candidate with a finance background who would welcome a role with a wider scope and opportunity to be involved in a diverse range of tasks and challenges for an ambitious and successful charity

### 2. FINANCE, BOOKKEEPING AND PAYROLL

- > Being accountable to the Bureau Manager and Finance Subcommittee 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
- > Producing draft end-of-year accounts and liaising with the appointed auditor to finalise the accounts each year with the support of the Bureau Manager and Treasurer
- > Bookkeeping, including but not exclusively: Posting of income and expenditure on accounts software with appropriate allocation to departmental budgets; setting up internet banking payments for authorisation; monthly bank reconciliation; setting up accounts at the start of the financial year; and production of monthly and quarterly reports for the Bureau Manager
- > Preparing and reviewing budgets in liaison with the Bureau Manager
- > Assisting the Bureau Manager with funding bids, where necessary
- > Payroll, including but not exclusively: Processing payroll and ensuring adherence to all relevant legislation regarding tax, national insurance, pension and other deductions or payments
- > Acting as a signatory and authorising expenditure within pre-determined limits

### 3. GOVERNANCE

- > Assisting the Bureau Manager in their role as Company Secretary and principal contact for OSCR and the FCA, to ensure that reporting requirements are fully met and Companies House returns are completed

- > Overseeing the on-going development and review of policies and procedures for the organisation and the Board, liaising with CAS to access shared policy resources, and introducing new policies when required
- > Making arrangements for the Annual General Meeting and ensure that all procedures are adhered to as required by the company's articles
- > Arranging and attending board meetings if required, ensuring the timely distribution of relevant documents, carrying out the Board's instructions when required
- > Preparing papers and attending and producing minutes for the Finance Sub-Committee
- > Supporting Board Members' understanding of policy, procedures and best practice where necessary

#### **4. COMPLIANCE**

- > Ensuring adherence to legal and regulatory standards as well as consideration of best practice in relation to all aspects of this post
- > Collaborating with CAS staff teams and coordinating the preparation of portfolios for CAS organisational audits and self-assessments
- > Keeping abreast of the latest developments in best practice in the field of governance and finance and advising the Bureau Manager and Financial Sub-Committee as necessary
- > Working with the outsourced, full-service Data Protection Officer and maintaining compliance with data storage, retention and destruction policies

#### **5. HUMAN RESOURCES**

- > Maintaining accurate staff records using our online HR tool Breathe and co-ordinating staff appraisals and support and supervision practices
- > Supporting the Bureau Manager with recruitment and induction processes
- > Administering the Bureau's annual leave processes
- > Liaising with the CAS Learning and Standards Team to ensure that mandatory staff training is carried out, arranging external training if necessary and monitoring training budgets
- > Supporting the Bureau Manager with HR issues including liaising with CAS HR for advice and guidance and taking minutes at grievance or disciplinary hearings and ensuring paperwork is effectively administered

#### **6. FACILITIES AND ADMINISTRATION**

- > Undertaking general office administration
- > Managing our IT inventories
- > Liaising with our building's facilities management 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 Bureau Manager and the Board of Directors

*The above job description is not exhaustive and is clarified to include broad duties inherent in the post as reasonable requested by the bureau manager.*

## Person specification

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### ESSENTIAL

- > Demonstrable experience working within a finance team
- > Substantial and demonstrable financial knowledge and experience covering all major aspects of the finance functions
- > Recognised bookkeeping qualification or associated experience
- > Experience and knowledge of financial and payroll systems
- > 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 service

### DESIRABLE

- > Experience 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

### Additional requirements

- The post is subject to the receipt of a satisfactory Basic Disclosure Certificate
- The post is subject to the disclosure of criminal history information