



Admin, Finance and Support Officer Job pack

Thanks for your interest in working at Citizens Advice Gosport. 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 Gosport
- 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 Valerie Kelly by emailing co@gosport.cabnet.org.uk or calling 02392 604605.

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 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.

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.

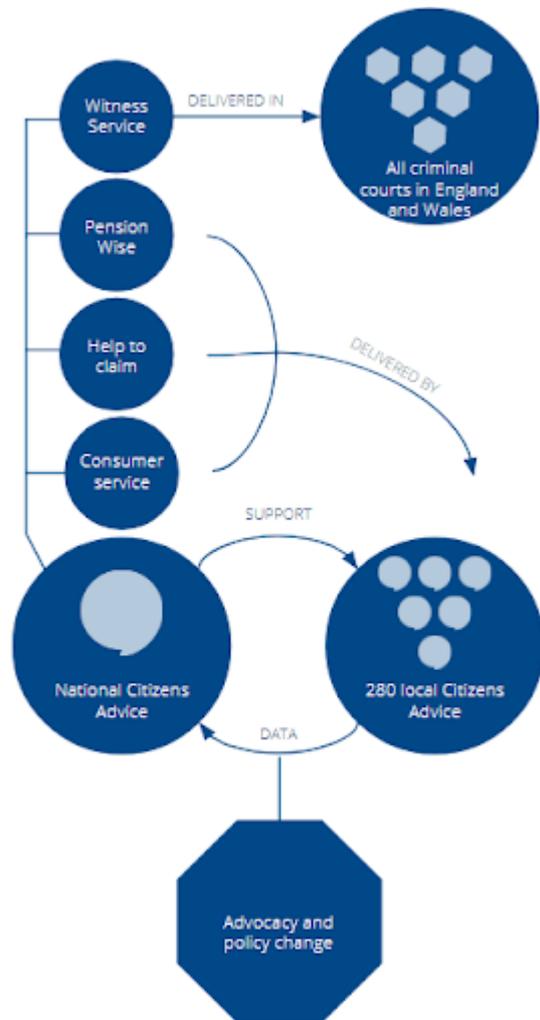
This role sits within our network of independent charities, delivering services from

- 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 context of this role is to provide high quality administrative and financial support for management, the Chair and Board of Trustees and the service overall; to provide finance administration and reports; to be responsible for undertaking financial management responsibilities; carry out tasks relating to compliance and governance as directed by management and the Board of Trustees. This will include drafting agendas, action lists and minutes

This is a demanding and varied role requiring someone with excellent time management skills and the ability to work on their own initiative. The successful applicant will have excellent attention for detail, be discrete and maintain confidentiality, be able to remain calm under pressure and maintain an approachable yet professional manner.

Working within a small team of paid staff and volunteers, you will be as comfortable ordering stationery supplies or refreshments to drafting finance and performance reports for management, trustees and funders. You will possess good interpersonal skills and be a strong team player. This is a varied role where you could be supporting the Chief Officer in producing the Annual Report to organising the AGM, ensuring compliance with statutory obligations.

The successful applicant will be required to maintain and produce accounting records in QuickBooks, including issuing invoices where necessary. You will also be able to demonstrate excellent IT skills including the use of Microsoft Office and SharePoint.

This position is based in Citizens Advice Gosport's premises at Martin Snape House, Gosport, reporting to the Chief Officer and board of trustees. Some work will be required outside normal office hours, for purposes such as trustee board meetings

This is a permanent role with a salary range of between £21,000 and £22,000 FTE depending on experience. Previous employment references will be required for a period of at least 2 years prior to the date of appointment. Previous experience of working within the Citizens Advice service would be beneficial but not essential. Any offer of employment will be subject to the receipt of satisfactory references.



Role profile

- Provide high level administrative support to staff, management and board of trustees
- Develop and prepare financial and project management reports including the use of graphs and other visual presentations
- Produce draft agendas, obtain approval and distribute
- Maintain registers of appointments and membership to ensure compliance with statutory requirements
- Arrange and attend staff and trustee meetings including those out of normal business hours
- Produce accurate Minutes of meetings for approval and distribution
- Ensure correct and proper filing of all company documentation
- Support management with the preparation of the Annual Report and Leadership Self-Assessment process
- Be responsible for maintaining the petty cash including reconciliation and reporting
- Maintain local information systems
- Maintain staff and volunteer records where required
- Maintain diaries and work records
- Support volunteers and paid staff with IT queries
- Undertake general admin duties such as maintaining stocks and supplies of consumables and other items needed for the smooth operation of the CAG service
- Ensure a high standard of professional behaviour and teamwork
- Deal with and respond to telephone and email queries
- Be willing to undertake any reasonable task requested for the smooth and efficient working of Citizens Advice Gosport

Specific tasks:

Finance

Payments

Maintain petty cash, reconcile cash in hand with the accounts and produce regular reports showing petty cash expenditure by category and project.

Check all supplier invoices, expense claims and any other requests for payment to ensure they are correct, and the goods or services have been received or expenses incurred. If the invoice is not correct resolve with the supplier prior to asking for Chief Officer sign off. Note on the invoice the expense account code and the project(s) the costs relate to.

Obtain signature and load to Dropbox and enter on the invoice log.

Be the contact point for the volunteer bookkeeper:

- Be able to explain what an invoice is for and how it has been allocated.
- Follow up missing invoices and address any queries

Receipts

Maintain a log of expected grant or other income, identify if any income is not received when expected or the amount appears incorrect. Where possible resolve with the funder or if this is not possible escalate to management on a timely basis.

Board support

Trustee meetings

Maintain a schedule of items to be covered at each meeting.

Agree with the Chair and CO the location of meetings and where necessary book the room for the year ahead. On the day of the meeting sort out logistics, refreshments etc. If the meeting is online send meeting details to attendees.

Update the Action Tracker and review this and a draft agenda with the Chair two or three weeks before the meeting.

Update the draft agenda and circulate to the CO and subcommittee Chairs to see if they have any items to add or suggestions to make. Finalise the agenda and agree it with the Chair.

Collect all the supporting papers and send these together with the agenda to the trustees, CO and others who attend the meeting. If any supporting papers are missing chase them up and if you can't obtain them ask the Chair and / or the CO for help. File all papers in the correct folders in the electronic storage facilities.

Collect any apologies from attendees and give a list to the Chair prior to the meeting. Attend the meeting and take the minutes making sure you understand the decisions and where appropriate a due date is agreed.

Draft minutes and review with CO and Chair following which circulate to attendees. If any questions are raised resolve them.

Correspondence, reports and other documents

- Deal with correspondence, documents and reports as required
- Input data into CRM systems, maintain statistics, collate and produce reports to a prescribed format
- Produce information from spreadsheets and database.
- Produce letters, documents and reports as required.
- Scanning, copying, collating and filing of documents

Meetings and Events

- Arrange meetings; including management team meetings, staff meetings, circulate papers agendas and minutes, attend and take notes of the meetings
- Collate agenda items, circulate papers, agendas and minutes to agreed timescales
- Attend appropriate internal and external meetings as required
- Help to arrange and coordinate outside events
- Preparation and distribution of leaflets, fliers etc
- Organise and distribute materials relevant to events e.g., Members invited to the AGM

Other duties and responsibilities

- Abide by health and safety guidelines and share responsibility for own safety and that of colleagues
- Any other relevant duties as may be required
- Ensure that work undertaken reflects and supports the Citizens Advice service equality and diversity strategy
- Maintain social media activities and update local information
- Maintain internal records such as IT asset list; contact lists
- Delegate appropriate admin tasks to volunteer admin support
- Promote the importance of research and campaigns work
- Assist with the production of the Annual Report, leaflets, posters and other literature in line with branding guidelines
- Behave in a professional manner and comply with Citizens Advice Gosport's policies and procedures



Person specification

Essential Criteria:

Proven ability to:

1. effectively and competently use a wide range of IT equipment such as computers, printers and scanners;
2. write clearly and accurately, communicate effectively face to face and on the phone
3. use office-based software such as the Microsoft Office suite, including Excel, google docs etc, working with cloud-based systems including Microsoft 365, SharePoint, Dropbox and others
4. demonstrate a high degree of accuracy, competence and efficiency in financial administration and the production of written reports
5. demonstrate awareness of the need for discretion and confidentiality
6. demonstrate the ability to produce accurate data reports, graphs and presentations
7. work well under pressure to meet deadlines
8. be adaptable and embrace change
9. maintain accurate computerised databases on internal and cloud-based systems
10. systematically manage a varied workload, prioritise and meet deadlines under pressure.
11. maintain efficient administration systems with attention to detail and demonstrable ability to maintain accurate, up to date records
12. have accurate numeracy skills and the ability to work within established financial systems.
13. take a brief, follow instructions, ensure the task is understood and then work independently with minimal supervision while adopting an efficient and common sense approach
14. use own initiative to achieve the desired result while working within accepted areas of responsibility
15. be a strong team player, act with honesty, integrity and respect, with a non-judgemental attitude

16. be prepared and willing to undertake any task reasonably requested for the fulfilment of the role or the benefit of the team.

Desirable Criteria

- 17. Previous admin and finance experience within the advice sector
- 18. Previous experience of working with computerised accounting systems
- 19. An understanding of statutory regulations involving a Charity and Company
- 20. Experience of working within a diverse team of paid and volunteer staff.

In accordance with Citizens Advice national policy, we may require 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.

Any offer of employment is subject to the receipt of satisfactory references from previous employers, usually for a period of at least 2 years prior to appointment.



What we give our staff

- Employee assistance programme
- Pension Scheme
- 28 days holiday per year
- The opportunity to work within an established and friendly team
- The opportunity of continuing professional development

As part of the selection process, applicants invited to attend the interview stage will be required to complete an exercise based on the intrinsic functions of this role. Candidates will be asked to notify us if, because of health or disability, any reasonable adjustments would need to be made so they can take part in the practice exercise.