



JOB DESCRIPTION

Job Title:	Finance Officer
Job Location:	The Jubilee Centre, Mosley Avenue, Bury, BL9 6NJ
Responsible to: Responsible For:	Chief Executive Officer _____
Hours of Work:	30 hours per week, flexible working arrangement available in the interest of the charity.
Salary:	£18,000 per annum, plus contribution to company pension.
Leave:	20 days per year on pro-rata basis, plus all statutory bank holidays and one compulsory day off from Age UK Bury. In addition, 3 days paid leave for you to undertake voluntary work for a charity of your choice.
Contract:	Permanent, subject to 6 months probationary period

JOB SUMMARY

To lead on the management of the Charity's finances.

KEY TASKS AND RESPONSIBILITIES

1. Responsible for the smooth running of all financial and administrative system
2. Responsible for overseeing the charity's budgets, income and expenditure, contracts, insurance, supplies, repairs, maintenance, and equipment
3. Administer the management of data, fulfilling the requirement of General Data Protection Regulation (GDPR)

Finance

1. Record financial transactions, produce profit and loss statements and balance sheets using the XERO accounting program
2. Complete VAT returns
3. Ensure that all bills are paid promptly and that sale invoices are generated, dispatched and payments are received in a timely manner.

4. Support the Treasurer and the Chief Executive Officer in the preparation of reports and budgets
5. Ensure that accurate and up to date financial information is always available for use and produce performance reports for the Resource and Performance Committee.
6. Management of petty cash
7. Send and record invoices for grants and contracts
8. Administration of the Workplace Pension
9. Collating and preparing information on staff salaries and forwarding on to the accountants for processing.
10. Administration for the Age UK Bury 100 Club (small local lottery)
11. Managing the procurement invoices and overseeing credit control
12. Administration claims and reporting for Gift Aid to be claimed on eligible cash donations, and Retail Gift Aid
13. Prepare information for auditors
14. Filing historical records and retrieving necessary documents as needed for others

General

1. Assist with the promotion and publicity of the charity's work
2. Support staff managers with administration when the need arises and help record monitoring outputs and outcomes to demonstrate the impact of the work
3. Assist the Chief Executive Officer with funding applications
4. Collaborate with staff and volunteers in other departments, occasionally taking on responsibilities outside of your normal role
5. Fill in for other staff members during annual leave and sickness absence
6. Attend supervision sessions and staff meetings
7. Carry out other duties relevant to this role to support the work and the aims of the charity, as directed by the Chief Executive Officer or Chair of Trustees
8. Undertake training relevant to this role as required

Person Specification – Finance Officer

Essential Criteria	Assessment Method
<u>Knowledge & Experience</u>	
Previous experience of producing financial reports, to include budgets, income and expenditure, insurance, suppliers	Application/ interview
Previous booking experience of using Microsoft Office applications; including Word and Excel	Application/Interview
Experience in the Xero accounting software, producing profit and loss reports	Application/Interview
Knowledge of how to complete VAT returns	Application/Interview
Experience collating and preparing information of Payroll on staff salaries	Application/Interview
Good time and project management skills	Application/ interview
Ability and willingness to work both independently and as a member of a team as required	Application/Interview
Ability to problem solve difficult situations	Application/ interview
Ability to multitask and work well under pressure, as well as setting your own deadlines	Application/ interview
Demonstrate good customer service skills	Application/Interview
Willingness to undertake any job, within reason, to ensure the smooth running of the charity	Application/Interview
Demonstrate reliability, integrity, attention to detail and accuracy	Application/Interview
Ability to drive with access to a vehicle for business use	Application/Interview
Willingness and ability to work flexibly including some evenings and weekends	Application/Interview
A proactive approach to the personal development of oneself and others	Application/Interview
<u>Desirable</u>	
Experience of taking and producing minutes	Application/Interview
Knowledge of Health & Safety legislation	Application/Interview
Fire Warden and First Aid at work certificate experience	Application/Interview



A brief introduction to our Charity

Age UK Bury is a medium sized charity with an annual turnover of just under 500K per year. There are 30 staff and 50 volunteers.

More information about our work is online at www.ageukbury.org.uk

A full set of accounts is available from the Charity Commission at <https://register-of-charities.charitycommission.gov.uk/charity-search/-/charity-details/5012877>

Horsfield and Smith, a Bury-based accountancy firm, independently examine the accounts.

Age UK Bury is an independent charity and works in partnership with the national Age UK and other Age UKs in Greater Manchester.

We use Xero as our accounting software.

We use the Microsoft Office 365 suite of programs including M/S teams. We use Canva for Desk Top Publishing.

Quality Assurance

We are proud to have achieved the Age UK Charity Quality Standard. Our achievement of the Age UK Charity Quality Standard recognises the high standard of our performance as an organisation. It certifies that our organisation is well governed and managed; has a clear direction and strategy; and is committed to ensuring the well-being and safety of older people, our staff and volunteers.

This quality award examines our financial controls and the work of the finance and admin staff and committee members in following good practise in the management of charitable funds.

Staffing Structure

The post holder is accountable to the Chief Officer, Ania Stark-Ketcher, who has recently joined the Charity. The Chair, Joan, has been with the charity since 1995 and The Treasurer, Pat, is a former Chief Executive with Bury Council, and both have a wealth of expertise and experience in charity management.

Location

The office is based at the Jubilee Centre in Moorside, Bury. The Centre is situated in a park and overlooks the beautiful Clarence Park Lido. The Jubilee Centre is an activity for older people and has a popular café for all visitors.

