**FINANCE MANAGER – APPLICATION PACK**

**(a) Introduction**

Advantage Africa supports people affected by poverty, disability and HIV to improve their education, health and incomes. Our work helps people to help themselves and build a better future for their families and communities.  More information is available from our [website](https://www.advantageafrica.org/file/advantage-africa-report-and-accounts-for-2020-21-pdf), [Facebook page](https://www.facebook.com/advantageafrica/) and [Annual Report and Accounts](https://www.advantageafrica.org/file/advantage-africa-report-and-accounts-for-2020-21-pdf).

We are seeking a Finance Manager to enable Advantage Africa and its partners to deliver cost-effective development among some of Africa’s most vulnerable people, and meet its statutory requirements as a UK registered charity.

This is a part-time position, reporting to the Director Andrew Betts, for which 18 - 21 hours per week will be required at times to be agreed. The job can either be located at Advantage Africa’s office in Olney or from home, with occasional visits to the office by mutual agreement.

**(b) Summary Job Details**

Advantage Africa is an equal opportunities employer. The salary will be in the range £26-£30k (pro-rata) according to skills and experience. You will be eligible to join our workplace pension scheme with an employer contribution of 5%, subject to a minimum personal contribution of 3%. There will be a probation period of three months with regular reviews. The starting annual leave allowance is 25 days pro-rata, plus statutory holidays.

**(c) How to Apply**

Please send your CV and completed application form to [jobs@advantageafrica.org](mailto:jobs@advantageafrica.org)

Interviews will be arranged with suitable candidates as applications are received and held in person or online by mutual arrangement.

The final closing date for applications is Sunday 29th May but we may bring this forward at no notice if a suitable candidate is found before this date. ***We therefore encourage you to apply as soon as possible.*** An early appointment will enable us to arrange a smooth handover period with the current Finance Manager.

If you have any questions not addressed in this pack and/or would like an informal discussion to help assess your suitability before making an application, please call Andrew on 01234 711005.

**(d) Job Description**

**1. Financial:**

The position involves taking full responsibility for Advantage Africa’s day-to-day financial management and statutory reporting. The post-holder will ensure that Advantage Africa’s financial records and systems are maintained and improved through the work listed below. The role may involve managing volunteers to undertake some of these tasks.

* 1. **Book-keeping and data management**

Ensure the effective recording of all financial transactions, with appropriate coding, approval, data entry and filing using Advantage Africa’s CRM (Salesforce) and accounting software (Xero).

* + 1. Purchase invoices and procurement.
    2. Income from supporters and donors, including overseeing of entries on, and management of our Salesforce fundraising database.
    3. UK and overseas trip expense claims.
    4. Payments of grants, allowances and other partner obligations.
    5. Journals to ensure correct accounting treatment.

* 1. **Bank Transactions: Payments, Transfers and Deposits**

Ensure that all required bank transactions are completed, with the required paperwork held on file and that the accounts system is updated to reflect this.

* + 1. UK payment of suppliers and staff expenses.
    2. UK payment of statutory payments
    3. International transfers of funds to partners in Africa.
  1. **Payroll**

Manage the payroll to ensure that staff and HMRC are paid on time, and any such schemes, supplementary payments or deductions as may be required are administered correctly.

* + 1. Preparation of monthly payroll.
    2. Management of pension scheme, statutory payments etc.
    3. Fulfilment of all related payments (pensions, NI, PAYE).
    4. Monthly and annual returns including P60 forms to HMRC.
  1. **Financial Accounting**

Ensure that the accounts are accurate, complete and give a true picture of the financial activity and status of the organisation.

* + 1. Reconcile all cash, credit cards, bank and other accounts.
    2. Reconcile all balance sheet accounts.
    3. Maintaining the fixed asset register.
  1. **Financial Management, Planning and Reporting**

Produce all financial management reports, such as are required by the Director, Programme Managers, Trustees and other stakeholders, to effectively manage the organisation.

* + 1. Prepare the annual organisational budget for submission to the Trustees for approval.
    2. Monthly financial management reports - income and expenditure against budget with variance analysis.
    3. Monthly cash-flow report.
    4. Monthly restricted funds reports - distribute and discuss with Programme Managers.
    5. Commentary on all standard financial reports.
    6. Other reports, including fundraising reports and schedules, profit and loss reports for specific fundraising initiatives, using Salesforce as needed.
    7. Working with Programme Managers, support reports, planning tools, due diligence assessments and proposals for donors and supporters according to their budgets and requirements.
  1. **Other Accounting Tasks**
     1. Maintain records of Gift Aid declarations and donations and process Gift Aid reclaims every two months.
     2. Manage all Advantage Africa bank and charity accounts with providers such as CAF, JustGiving and Paypal.
     3. Ensure restricted funds are ring-fenced, and expenditure against these monitored.
     4. Support other UK staff and partners in East Africa to monitor and overcome any financial problems and contribute towards improving their financial skills.
     5. Undertake periodic review and revision of Advantage Africa’s financial software, policy and procedures to ensure continuous improvement.
  2. **Annual Returns**
     1. Complete all appropriate year-end adjustments: currency fluctuations, depreciation of fixed assets, accruals and prepayments, allocations of expenditure.
     2. Produce the Annual Report and Accounts, in correct format to comply with Company and Charity law and appropriate Statement of Recommended Practice (SORP). To include preparing the statement of financial activities, balance sheet and notes to accounts.
     3. Manage the year end independent financial examination and preparation of audit files.
     4. Maintain records with Companies House and Charity Commission, including submission of the Annual Return.

**2. Other tasks**

* 1. Evaluating and comparing suppliers, maintaining supplier files and making purchases and orders for utilities insurance etc.
  2. Preparing for Trustees’ meetings and presenting the financial reports.
  3. Managing the rotation of Trustees according to our policy.
  4. Managing the review of Advantage Africa’s policies at trustees meetings.
  5. Managing staff holiday and TOIL.
  6. Ensuring regular backups of financial data.

1. **Any other duties as required**

As part of a close-knit team working in a small organisation, you will need to be flexible to fulfil Advantage Africa’s strategic goal goals of better lives for vulnerable people. You may be asked to analyse data used to measure the charity’s impact or appropriately target our communications.

There is potential for the role to develop according to your specific skills, capacity and interests. This might for example include supporting the growth of our partners’ financial skills, taking on the role of Company Secretary, managing our IT or harnessing the potential of Salesforce to improve our fundraising activities.

**(e) Person Specification**

|  |  |
| --- | --- |
| **Essential** | **Desirable** |
| *Education, Qualifications and Training* | |
| * Qualified or part-qualified accountant | * Trained on Xero and/or Salesforce |
| *Professional Skills and Experience* | |
| * Excellent numeracy and accuracy * Experience in a finance role * Day to day book-keeping including reconciliations * Practical intermediate level experience of MS Excel (formulae, data sort etc) * Use of accounting software * Monitoring and maintaining accounts * Budget preparation and monitoring * Production of financial management reports * Year-end procedures and accounts * Competent in MS Word | * Experience within a charitable organisation * Advanced MS Excel * Practical experience of Xero and/or Salesforce * Practical experience of charity accounting * International money transfers * Online banking * Currency fluctuations and exchange rates * Building people’s financial capacity, through producing resources, training or one-to-one help * Developing and improving systems * Charity fundraising and administration * Databases, CRM * Data protection including GDPR |
| *People Skills* | |
| * Able to work both independently and in a team * Able to communicate well with people of different cultures and with different levels of knowledge, often remotely | * Able to negotiate contractual issues |
| *Knowledge* | |
| * Accounting principles and procedures | * Charity/company statutory reporting * Community development in Africa |
| *Personal Characteristics* | |
| * Legal right to live and work in the UK * Patient but assertive * Ability to prioritise/manage a busy workload * Problem-solving ability * Self-motivated * Quick learner * Interest in overseas development |  |

**(f) Application Form**

*Please delete the descriptive pages 1-5 of this job pack so you’re left with the application form only, rename the document with your own name and email your completed form, together with your CV to* [*jobs@advantageafrica.org*](mailto:jobs@advantageafrica.org)***to reach us as soon as possible.*** *All applications will be acknowledged by email with 48 hours of receipt.*

**1. Personal Information**

Preferred title and full name:

Address:

Email:

Telephone number:

Are you eligible for employment in the UK?

**2. Present/Most Recent Employment**

Job title:

Date appointed:

Employer’s name and address:

Present salary:

Notice to terminate:

Please ensure the main activities of your present/most recent job are covered on your CV.

**3. Other Skills and Interests**

Please tell us about your skills and interests outside of work, such as any voluntary work that you have done or do, languages you speak, organisations that you belong to/support, developing countries you have visited.

**4. Supporting Information**

Please explain what motivates you, why you are applying for this position, the relevance of your previous experience and how you meet the person specification.

**5. Referees**

Please provide the names and addresses of two referees that are not related to you in any way, including your most recent or current employer. Please note we will usually consult referees at the appointment stage and always with your prior permission.

|  |  |
| --- | --- |
| Name: | Name: |
| Address: | Address: |
| Telephone: | Telephone: |
| How known: | How known: |

**6. Additional Information**

When is the earliest date that you would be able to start work?

Please state your preferred working pattern for the job including how many days you would like to work and your preference for office or home-based working.

Where did you see this job advertised?

**7. Declaration**

I declare that the information I have provided in this form is true and correct and can be treated as part of any subsequent contract of employment. I understand that any false or misleading statement will disqualify me from employment.

Signed:

Date: