

APPLICATION PACK

Sept 2020

POST - FINANCE & BUSINESS SUPPORT MANAGER

Dear Applicant,

Thank you for your interest in the position of Finance & Business Support Manager at Paul's Place.

Paul's Place is a charity that enhances life for physically disabled adults. We do this by providing social activities that connect people, reducing isolation and giving people the opportunity to develop new skills, enjoy new experiences and live life to the full.

Established in 1995 the charity has supported hundreds of physically disabled adults and those with cognitive and sensory impairment. The charity launched an ambitious five-year strategy at the start of 2020 that aims to see the charity support more physically disabled adults across South Gloucestershire and Bristol.

COVID-19 has had an impact on the milestones within the strategy and further highlighted the inequalities that physically disabled people face. Our ambition to grow, according to the needs of our service users, remains at the heart of the strategy and you will be a key addition to the team to make this happen as well as recover from the impact of the pandemic.

The Finance & Business Support Manager is a newly created post, promoted by both the retirement of our longstanding Finance Officer and the restructure of the Paul's Place team. The new role will, together with the Operations Manager, act as a 'number two' to the CEO and as a key member of the Senior Leadership team you will work collaboratively with the Board of Trustees to ensure that all finance and business support systems are in place to support the charity.

You will have an accounting qualification or extensive experience of working in a senior financial position and experience of all aspects of financial management as well as business support and HR knowledge.

If you are interested in applying, please send a CV, with a covering letter **highlighting your skills and experience against the person specification (no more than 3 sides of A4)** to dcheesman@paulsplace.org.uk by midday on Friday 9th October 2020. **You should note that CVs received without a covering letter will not be considered.**

For your information, interviews for this post will be held on Friday 16th October 2020 (we are currently expecting these to be held via Zoom)

If you would like to speak to further about this role, please contact Daniel Cheesman our CEO on 07501767488 or email dcheesman@paulsplace.org.uk

Job Description

Title:	Finance & Business Support Manager
Reports to:	CEO
Direct Reports:	Finance and Admin Assistant, Monitoring, Evaluation & Outcomes Officer
Remuneration:	£32,784 - £34,208 (3% employer contribution to pension)
Hours:	37 hours (substantial part-time hours considered)
Based:	Paul's Place, Coalpit Heath Cricket Club, Bristol (some home working)
Terms:	Permanent, 25 days annual leave entitlement, plus bank holidays, occasional evening work
DBS Status:	Enhanced DBS with appropriate barred checks

ROLE PURPOSE

The Finance & Business Support Manager will lead, direct, develop and be responsible for the Finance, HR and administrative functions of Paul's Place (South West), reporting directly to the CEO and working collaboratively with the Senior Management Team and Trustee Board ensuring that the finance and business support systems are in place to support the strategy of the charity.

MAIN DUTIES	
Financial Management	<ul style="list-style-type: none"> • Produce monthly management accounts within ten days of month-end • Preparation of the annual budget and forecasts • Liaise with charity's accountants regarding the year end and preparation of the charity's statutory annual accounts (financial year 1st Jan – 31st Dec) • Ensure the efficient and accurate management of the charity's payroll function (currently outsourced, but looking to bring in house) • Oversee financial administration and bookkeeping, ensuring robust internal controls (use of QuickBooks) • Ensure accurate records are maintained and payments submitted in accordance with external legal and tax requirements. • Contribute to the development of pricing models for earned income activity, working with the Fundraising Manager to prepare budgets for new projects • Provide financial information for funding bids and pitches. • Work with colleagues to ensure that income generation processes are effectively integrated with finance systems (e.g. Gift Aid declarations) • Ensure systems are in place to support monitoring and managing of spend against specific funded projects. • Responsible for working with external auditors to manage the audit of end-of-year accounts. • Liaise with the charity's bankers, auditors, payroll bureau and pensions advisors.

	<ul style="list-style-type: none"> • Keep abreast of financial developments across the charity sector. • Prepare and present financial information to the board of trustees. • Responsible for the Finance Sub-Committee (see under governance). • Support the CEO and the SMT on the financial management of the charity.
Office Management	<ul style="list-style-type: none"> • Ensure effective IT systems are in place, including managing the relationship with our external IT support provider ADT, procurement of hardware and software, security and disaster recovery arrangements. • Oversee day-to-day office systems for security, maintenance, housekeeping and visitor welcome. • Act as budget-holder for office and administration budget lines, ensuring value for money. • Review and oversight of all contracts. • Oversee the management of the CRM system and manage the Monitoring and Evaluation Officer.
HR Management	<ul style="list-style-type: none"> • Responsible for ensuring all HR systems are up to date. • Work with the Head of Operations to ensure that any staff issues are managed following policy and procedure. • Liaise with the charity's HR support to ensure that that the charity is compliant and up to date with any changes in employment law. • Line manage the Finance and Admin Assistant and Monitoring, Evaluation & Outcomes Officer setting work and carrying out one to one's and annual appraisals.
Compliance	<ul style="list-style-type: none"> • Oversee timely submission of accounts and reports to HMRC, Companies House and Charity Commission. • Act as Data Protection Officer for the charity and ensure GDPR compliance. • Ensure insurance cover is fit for purpose and value for money. • Act as health and safety lead in partnership with Head of Operations, sourcing expert advice if needed.
Governance	<ul style="list-style-type: none"> • Work closely with the Treasurer to support effective functioning of the Finance Sub-Committee (e.g. produce and present reports including quarterly management accounts, funding pipeline etc; administer meetings including minute-taking). • Work with the Treasurer and Chief Executive to ensure that all trustees understand fully Paul's Place (South West) finances and their responsibilities in this regard.
General Duties	<ul style="list-style-type: none"> • To develop professional relationships with staff, volunteers, members, Trustees, and management colleagues. • To adhere to the Paul's Place Professional Boundaries Policy and 'live out' the Paul's Place values (inclusive, encouraging, empowering, caring and friendly) • Attend line management supervision, team meetings and annual appraisal. • All staff may be asked to undertake other duties and responsibilities as determined the CEO or Board of Trustees.

Person Specification

EXPERIENCE		Essential (E) / Desirable (D)	How assessed
1	Strong post-qualification experience at senior level in the charity sector.	E	I
2	Experience of working directly with charity trustees and writing and presenting financial reports to trustee boards.	E	I
3	Experienced line manager.	E	I
4	Strong track record in all aspects of charity financial management, including budgeting, reporting, cashflow, treasury, internal controls and audit.	E	I
5	Extensive experience with computerised accounts software including creating and tailoring reports.	E	I
KNOWLEDGE			
1	Excellent working knowledge of financial issues for charities (e.g. VAT, SORP reporting requirements and restricted fund accounting).	E	A/I
2	Knowledge of General Data Protection Regulation Act (GDPR) and health and safety	E	I
3	Knowledge and understanding of the disabilities and the challenges that disabled people face in line with knowledge of equality and diversity.	D	I
4	A thorough understanding of HR principles and good practice	E	A/I
SKILLS			
1	Ability to think and work strategically	E	A/I
2	Ability to analyse and interpret complex information and to communicate key issues in an accessible way for colleagues, trustees etc.	E	I
3	Able to manage a diverse workload and meet deadlines	E	I
4	Enjoy working in a small organisation and understand the complexities that can exist.	D	I
QUALIFICATIONS			
1	Accounting qualification (e.g. AAT) or extensive experience working in a senior financial position.	E	Ap

How assessed:

A – Assessment

I – Interview

Ap – Application Form

ABOUT PAUL'S PLACE

WHO WE ARE

Paul's Place is a charity that enhances life for physically disabled adults. We do this by providing social activities that connect people, reducing isolation giving people the opportunity to develop new skills, enjoy new experiences and live life to the full.

Our vision is a world that embraces disability and includes everyone, ensuring that all people can live their life to the full.

Our mission is to enhance the lives of physically disabled adults and those with cognitive and sensory impairment, supporting them to live life to the full. We do this through projects and activities that:

- Provide social activities that connect people, build friendships, reduce loneliness and isolation;
- Encourage people to develop new skills and achieve independence;
- Develop opportunities for people to improve their health and wellbeing.

Our values are that we are:

- **Inclusive** – we are inclusive and recognise that no two people are the same. We celebrate and promote the diversity of everyone.
- **Encouraging** – we are encouraging and promote new opportunities and experiences that take people out of their comfort zone.
- **Empowering** – we are empowering and believe that everyone has the right to 'choice and control' when it comes to their own lives.
- **Caring** – we are caring in everything that we do and ensure that everyone is treated with dignity and respect.
- **Friendly** – we are friendly with everyone and strive to ensure that there is an element of fun in all that we do.

OUR SERVICES

Our current services include:

- Paul's Place Daily
- Paul's Place Socials
- Paul's Place Boccia
- Paul's Place Sports
- Paul's Place Carers (There2Care)

OUR HISTORY

The Paul's Place journey began in 1995, when a group of friends led by Paul's Place founder Kath Aldom MBE, got together to form a club where physically disabled adults could meet to socialise.

At first the group met once a month, but due to growing numbers and over a short space of time, the first 'daily' activities began with our first home at The Miners Social Club at Coalpit Heath. The membership of Paul's Place continued to increase, and we quickly outgrew the space available at The Miners and were soon looking for a new home.

In 2007 Coalpit Heath Cricket Club offered Paul's Place the opportunity to relocate. Growing numbers meant that Paul's Place continued to expand and in 2011, due to the fantastic fundraising efforts of all at Paul's Place, the Paul Willmott annex at Coalpit Health Cricket Club was opened. The annex provided more facilities and has allowed the charity to support more people. A People's Lottery Grant soon followed which paid for an external ramp that made the outside space accessible to wheelchair users.

Paul's Place was registered as a charity in 1997 and remained an unincorporated organisation until January 2020 when Paul's Place became a limited company alongside a charity. At this time, our official and legal name became Paul's Place (South West) although we are still known simply as Paul's Place.

Paul's Place would not be the organisation that we are without the vision, determination and efforts of the founding members and all those who have supported the charity along the way.

PAUL

Paul's Place got its name in a rather unusual way. Back in 1995 when the group was formed, a young disabled man Paul Willmott was part of the initial conversations about the group.

He was keen to be part of the club, as he, like the other founding members wanted to see a social group set up for them and a club that they could own. Sadly, Paul died just as the club was forming. As a tribute to Paul the other founding members decided, that in his memory, the group would be known as Paul's Place. Paul's family have continued to support the charity over the years and are so pleased that Paul lives on through the charity.

Today, 'Paul' embodies anyone using the charity, regardless of gender or disability as we are a people-based, disability-led charity and continue to replicate the ethos of the original club.

BOARD OF TRUSTEES

Paul's Place is governed by a Board of Trustees (Directors of the Company), this consists of up to 11 elected Trustees, and is currently chaired by Steve Howells.

More information about Paul's Place, our strategy and latest accounts can be found on www.paulsplace.org.uk

STAFF BENEFITS

Financial Benefits

- Real Living Wage Employee
- 3% employee pension contribution
- Free parking

Wellbeing

- 25 days annual leave
- Employee Assistance Programme (free, 24 hours)
- Home working & flexible working considerations

Training and Development

- Full induction
- In house training
- Training and Development Policy, with time off to study

GDPR AND OUR APPLICATION PROCESS

DATA YOU SHARE WITH US

Any data that you share with us in your CV and supporting letter will be used for recruitment purposes only. We have a legitimate interest to some of this data in order to shortlist your suitability to the post.

WHO WILL SEE THE DATA

The only people viewing the data will be those receiving the application, those shortlisting for the post and those on the interview panel. Should you be offered the post, then the Administration Officer will then have access to your data to set up the HR systems that are required for the role.

WILL WE SHARE YOUR DATA?

Your data will not be shared outside of Paul's Place. It maybe that an external stakeholder is invited to be on the interview panel and in this instance, systems will be put in place to ensure that data does not leave Paul's Place.

WHERE WE FIND CANDIATE DATA

The only data that we would have about you is anything that you chose to share with us through your application form.

HOW WILL WE PROCESS YOUR DATA

Your data will be sent to us via email and will be kept on our shared drive for the purposes of shortlisting and, if shortlisted interview. Those shortlisting will have access to the shared drive and in the instance of an interview a copy of your CV and covering letter maybe printed in a hard copy for interviewers to look at. Any data that identifies you would be omitted from any hard copies printed and all copies would be destroyed after the interview process.

HOW LONG WILL WE KEEP YOUR DATA

All data will be kept for one month after the shortlisting and interview process, after this time it will be destroyed. Should you be offered employment then this data may be transferred to your HR file.

YOUR RIGHTS

You have the right to be forgotten, to rectify or access the data we have about you, to restrict processing, to withdraw consent and to be kept informed about the processing of your data.

HOW WE PROTECT YOUR DATA

Our general privacy policy can be found <https://www.paulsplace.org.uk/privacy-policy/>