

Job Description

Job Title:	Finance Manager
Grade:	Band 6 to 7
Hours of Duty:	37.5 Hours

Organisational Arrangements

Accountable to:	Director of Finance and Income Development Chief Executive Officer
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Role Summary

The Finance Manager is a key member of the Hospice extended Senior Management Team (ESMT) and plays a central role in ensuring the smooth running of the Hospice. Reporting to the Director of Finance and Income Development, the Finance manager is responsible for the leadership, development and day to day management of the finance department. Providing high quality comprehensive administrative and financial support to the Hospice.

The Finance Manager is responsible for driving continuous improvement in accounting practices and embedding financial best practice, ensuring there are financial policies and procedures in place that cover all areas of the Hospice's governance and compliance responsibilities.

Key Responsibilities

Financial Management & Reporting

- Prepare monthly management accounts, variance analysis, and financial reports for the Senior Leadership Team.
- To manage, control and develop all financial processes and systems.
- To assist with the setting of budgets (annually) and in year forecast and undertake effective monitoring of budgets.
- Manage annual budgeting and forecasting processes in collaboration with departmental managers.
- Attend monthly budget meetings with Shop Managers and heads of departments to review expenditure/income against budgets and highlight any areas of concern. Alerting the Director of Finance & Income development.
- Monitor cash flow, reserves, and investment accounts to ensure financial sustainability.
- Assist in the preparation of the statutory accounts in line with the Charities SORP.
- Monthly Balance Sheet Reconciliations
- Monthly Restricted Funds Reconciliations

- Ensure legacy Income is recorded correctly in sage and all associated legal paperwork is kept for audit purposes.
- Monthly Gift Aid Reconciliations

Operational Finance

- Oversee purchase ledger, sales ledger, payroll, and bank reconciliations.
- Ensure accurate recording of income from donations, fundraising, grants, retail, and legacies.
- Maintain robust financial controls and procedures, reviewing and improving them as required.
- Support hospice departments with financial advice and budget management.

Compliance & Governance

- Ensure compliance with charity law, HMRC requirements (including Gift Aid), and internal financial policies.
- Support the Director of Finance & Income Development with clear, timely financial information.
- Assist with financial aspects of grant applications and reporting to funders.

Leadership & Collaboration

- Line-manage finance staff and support their development through one-to-ones appraisals
- Work closely with fundraising, retail, clinical, and operational teams, participating in multi department meetings.
- Progress the hospices strategic objectives to achieve long-term financial sustainability

Support to Director of Finance & Income Development

- To act professionally with external and high level stakeholders to answer routine and complex questions regarding Dr Kershaw's financial processes and systems.
- To assist in the interpretation and/or implementation of new regulations and guidance.
- Plan, prioritise and manage own workload, working proactively with minimum supervision and without guidance unless requested, dealing with issues as they arise.
- Lead on financial meetings ensuring timely production and circulation of minutes as necessary.
- Assist with Hospice UK Benchmarking reports
- Assist with annual business planning.

- Contribute to the Hospice Annual Report.

HR and Management Responsibilities

- Deal with a range of sensitive and confidential information professionally ensuring that standards of patient confidentiality are maintained.
- Provide leadership and management of finance staff promoting high performance standards both individually and as a team.
- Using expert knowledge of governance and compliance processes, ensure staff fully understand their roles, accountabilities, and responsibilities.
- Ensure legislative changes are recorded in all policies and procedures and brought to the attention of the relevant staff.
- Participate in the recruitment of staff.
- Undertake annual appraisals of finance staff.
- Manage the gathering and provision of evidence for internal and external assessments as requested by the CQC and any other future local, regional and national bodies.
- Participate in the Senior Management Team On-Call rota.

Health and Safety/Security

1. To be familiar with all requirements of the Health and Safety at Works Acts and the Hospice Health & Safety policies and regulations applicable to the post.
2. To co-operate actively with the nominated Health & Safety person in achieving the aims of the Hospice Health & Safety Policy, Fire Regulations, related issues and various procedures and ensure the legal requirements are met.
3. To take responsible care the health and safety of themselves and of others who may be affected by their acts or omission, and comply with the Health and Safety legislation.
4. To wear appropriate safety clothing and use appropriate safety devices as requires, and not to interfere with or misuse anything which is provided in the interests of health and safety.
5. To report and co-operate with the investigation of all incidents and accidents that have led to or may lead to injury and to report all hazards or shortcoming in the protection arrangements.
6. To ensure as far as predictable that all materials used within the Hospice and its subsidiaries for fundraising activities are properly stored, used and disposed of and that any items of equipment are properly tested, used, maintained and repaired as necessary.
7. To oversee appeals and event Risk Management Assessments and ensure outcomes are acted upon.

Education & Training

The post holder will:

1. Participate in the appraisal system
2. Take responsibility for pursuing his/her own development and an agreed personal development plan which meets the needs identified in reviews of performance.
3. Maintain knowledge of financial procedures and standing financial instructions to ensure compliance at all times in undertaking aforementioned duties.
4. Participate in the orientation of new staff.
5. Attend all mandatory training/update sessions.
6. Ensure that finance staff receive training to assist them in improving and developing their roles.

Volunteers

1. Dr Kershaw's Hospice is generously supported through its active volunteers who work alongside employees of the Hospice, across all departments, helping to fulfil the needs of the services.
2. As part of all roles at the Hospice, it is expected that all post holders commit to assisting and supporting volunteers to perform their roles to the best of their ability. In addition, it may be required of the post holder to act as a volunteer lead if identified with the Volunteer Co-coordinator, as appropriate.

General

1. **Confidentiality** - It is a condition of employment that staff will not disclose any information obtained in the course of their duties other than to those entitled to receive it. The post holder must ensure that the confidentiality of personal data remains secure and the terms of the Data Protection Act and relevant Hospice policies are met in respect of information held on the Hospice computer system.
2. **Equal Opportunities** – The Hospice is committed to equality of opportunity. All staff are required to comply with current legislation and Hospice policies.
3. **Health and Safety** – Staff must ensure they are familiar with the requirements of the Health and Safety Work Act (1974) and the Hospice Health and Safety policies and regulations applicable to their post.
4. **Safeguarding** – Dr Kershaw's Hospice is committed to safeguarding adults and children and expects all staff to share in this commitment. Staff have a responsibility to ensure that they are aware of specific duties relating to their role and should familiarise themselves with the Hospice safeguarding policy. Regular safeguarding training updates will be held and are mandatory for all staff.

The above indicates the main duties that may be reviewed in the light of experience and developments within the service. Any review will be undertaken in conjunction with the post holder.

Due to the nature of the organisation you will undertake any other reasonable tasks or duties that are deemed to be within your capability, to meet the needs of the organisation's services and/or directed by a senior manager to whom you have a reporting relationship.

PERSON SPECIFICATION

JOB TITLE: Finance Manager

	ESSENTIAL	DESIRABLE	METHOD OF ASSESSMENT
	The qualities without which a post holder would not be appointed.	Additional qualities which can be used to choose between candidates who meet all the criteria.	Application form/ Interview/ Certificate / Other.
QUALIFICATIONS	<p>Professional financial qualification as recognised by the Association of Accounting Technicians (AAT).</p> <p>Minimum 5 GCSEs including Maths and English (or equivalent) and 2 A levels.</p>	<p>Part/Full qualification with CIMA/CIPS or equivalent qualification</p> <p>Degree or equivalent qualification.</p> <p>ECDL</p>	Application form/ CV and certificates
EXPERIENCE SKILLS/KNOWLEDGE	<p>Significant experience operating at a senior level within a Finance Department.</p> <p>Considerable experience of working in a relevant financial environment.</p> <p>Excellent communication skills.</p> <p>Experience and ability to successfully develop and monitor budgets for departments, services or programmes.</p> <p>Experience of business planning and costing.</p> <p>Ability to prepare plans for financial and people aspects of service provisions contributing to the medium term financial strategy.</p> <p>Experience of adapting to changing priorities and able to juggle multiple tasks</p> <p>Experience of managing a team (including carrying out one-to-one's and appraisals)</p> <p>Experience of implementing and developing policies and procedures to meet and improve services.</p> <p>Knowledge and understanding of relevant legislation.</p> <p>Excellent IT skills including Sage, Word and Excel.</p>	<p>Experience of similar role in the Public Sector/NHS.</p> <p>Experience of managing accounts within the voluntary sector.</p> <p>Experience of public sector commissioning.</p> <p>Experience of working with and supporting a Board of Trustees.</p>	Application form/CV /interview and references.

	<p>Experience of planning, design and developing IT information systems to manage financial data and management reports.</p> <p>Ability to motivate, appraise and develop staff within the Finance Department.</p> <p>Ability to work on own initiative to tight deadlines with particular attention to detail.</p> <p>To work as part of the extended Senior Management Team.</p>		
<p>Aptitudes</p>	<p>Pleasant attitude and professional approach.</p> <p>Communicate creatively</p> <p>Ability to influence people</p> <p>Able to maintain confidence.</p> <p>Able to work accurately under pressure.</p> <p>Adaptable to change.</p> <p>Able to proactively solve problems.</p>		