**Business & Finance Officer – Job Description,**

**Person Specification & Competencies**

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| Name of Employee |  |
| Date of Issue |  |
| Department/Location | Head Office – Worthing – occasional travel to other sites across West Sussex  |
| Reporting Line | Finance & Resources Manager  |
| Grade | Grade 3/4 |
| DBS – Level Required |  |

**Job Description** -A summary of the role and key tasks needed to perform the role.

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| **Job Summary** |
| West Sussex Mind is a local Mental Health charity providing support to people with mental health problems and also undertaking work to challenge stigma and raise awareness around mental health in local communities. The role of the Senior Finance and Resources Officer is to take responsibility for leading all day to day finance and resource management tasks for WSX Mind.  |
| **Scope & Accountabilities**  |
| Potential to line manage administration staff or volunteers |
| **Key Tasks**  |
|  **Finance** 1. Undertake all data entry/bookkeeping tasks on Sage, including allocation of management costs, staffing and other costs to specific budgets.
2. Maintain systems and accounting records carrying out appropriate system or account checks and reconciliations.
3. Manage credit control activities: receive, check, pay and entry to Sage all creditor invoices, staff/volunteers/service user expense claims, collate pay & record entry to Sage for any credit card payments made, arranging new cards for eligible employees and cancellations where necessary.
4. Undertake finance related administration including data entry, raising invoices, banking and other day to day tasks.
5. Ensure all payroll information is collated and sent to our payroll provider within agreed timeframes.
6. Oversee the implementation and maintenance of fundraising systems and process for donations, Gift Aid, fundraising income through websites and community fundraising.
7. Provide budget and cost information to staff to support fund-raising bids and tenders
8. Being day to day lead for the WSX Mind pension scheme ensuring we are compliant with auto enrolment and that all records are being maintained and shared. Also being key point of contact for staff enquiries and making sure new staff are informed about advised etc.

**Business Management** 1. Ensure that we hold up to date contracts for and with all suppliers including for – IT, insurances, utilities, premises management etc. - Maintain records of all supplier contracts and act as a key point of liaison with all suppliers around contracts and queries relating to these
2. Lead on contract renewal or proposed changes ensuring best value for money and where appropriate securing alternative supplier quotes and supporting any tendering which is to be undertaken
3. Be a main point of contact for all staff reporting repairs and be key contact with premises management company reporting repairs and liaising with service managers around this
4. Oversee annual maintenance and renewal programmes liaising with service managers around maintenance and renewal budgets and overseeing that annual maintenance programmes and renewals are undertaken including organising quotes and making decisions around work to be taken.
5. Alongside HR & Governance Lead be a first point of contact for all staff around routine IT issues and problems providing basic advice where required and following this provide authorisation to staff to contact IT company for IT support
6. Manage day to day relationship with IT support company including working to minimise and oversee IT support spend
7. Maintain IT assets/equipment register and oversee allocation of IT equipment to staff including overseeing authorising and ordering of new IT equipment where this is required.
8. Oversee ordering of head office equipment and office supplies and consumables
9. Overseeing the maintenance and up to date recording on fixed asset register and service inventories working with service managers around this where required.

 **General** 1. Provide written and verbal reports as required.
2. Undertake any other tasks and duties as required as requested by the Manager and to meet the requirements of the department.
3. Be aware of and follow all Health & Safety regulations, particularly related to work surroundings.
4. Adhere to all WSX Mind policies and procedures.

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**Person Specification** - The specific skills, knowledge and abilities required of an individual to be able to effectively perform the role.

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| **Essential Qualifications and experience** |
| * At least 3 years-experience working in a financial function within an organisation or finance being a significant element of a role within a business administration role.
* Experience of using Sage accounting system, or equivalent accounting package
* Experienced IT user with excellent knowledge of office 365
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| **Preferred Qualifications and experience**  |
| * Experience of working in a charity finance and resources role
* Finance qualification e.g. Have, or working towards, AAT Level 3 or other relevant professional training.
* Experience of payroll preparation and reconciliation
* Experience with supporting others with general IT support and queries
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| **Essential Professional & Technical Knowledge, Skills and Abilities** |
| * Knowledge of and confident user of SAGE accounting system, or equivalent accounting package
* Strong financial management, book-keeping and administration skills
* Good understanding of financial systems and the practices and controls surrounding them.
* Ability to communicate effectively in person, in writing and over the telephone with internal and external stakeholders.
* Ability to resolve problems/issues or undertake system/account reconciliations effectively and efficiently.
* Ability to prioritise tasks and work accurately under pressure within prescribed deadlines.
* Confident, organised and methodical in approach to work with strong attention to detail.
* Ability to contribute and collaborate as part of the WSX Mind Head Office Team.
* A commitment to the wider work of WSX Mind and Mind’s mission and values.
* Highly proactive and demonstrating ability, commitment and motivation to learn and develop
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**Competencies – Level : Core, Skilled, Supervisory & Management** - All staff are required to meet the competencies and indicators in the CWSX Mind Competency Framework at the appropriate level for their role. Below are the competencies and indicators relevant for this role:

**1. Demonstrating Personal Qualities**

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|  | **Core** | **Skilled** | **Supervisory** | **Management** |
| **1.1 Developing self-awareness** | Recognises and articulates their own values and principles, understanding how these may differ from those of other individuals and groupsIs open to and responds positively to constructive feedback from colleagues and managers  | Identifies their own strengths and limitations, the impact of their behaviour on others, and the effect of stress on their own behaviour and identifies effective ways to manage this | Identifies their own emotions and prejudices and understand how these can affect their judgment and behaviour. Uses effective methods to achieve emotional intelligence (defined as the capacity to be aware of, control, and express one's emotions, and to handle interpersonal relationships judiciously and empathetically)Challenges perceptions and inbuilt prejudices of others positively | Models and leads self-awareness and reflective practices across the organisation at all levels  |
| **1.2 Managing yourself** | Undertakes their workload and activities to a high standard, fulfilling work requirements and commitments, without constant supervision Able to communicate in good time any concerns regarding their work/workload with their manager/team, to achieve effective time management and minimise stress in order to maintain good physical and mental healthAble to model what they are promoting, including good physical and mental health, straightforward communication, demonstrating hope and belief in new opportunities and positive outcomes | Uses creativity, initiative and good judgement throughout their work  Upholds personal and professional ethics, in-line with the values and culture of CWSX Mind | Acts decisively, confidently, positively and confronts and resolves issues in a timely mannerActively involved in promoting high levels of service and expected behaviour across CWSX Mind by being a positive role model  | Inspires others to believe in and to act upon CWSX Mind values by providing a vision and being a role model in all areas of workRole models exemplary positive work attitude, time management and work–life balance principles |
| **1.3 Continuing personal development** | Positively changes their behaviour in the light of feedback and reflectionCompletes training and learning opportunities where appropriate and available | Acknowledges mistakes and treats them as learning opportunitiesParticipates in variouscontinuing professional development activities (e.g. meetings, training, reading relevant literature) | Actively seeks opportunities and challenges for personal and professional learning and development | Models and leads continuous personal development across the organisation at all levels |

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| **1.4 Acting with integrity** | Values, respects and promotes equality and diversity in work in-line with CWSX Mind’s Equalities PolicyIs able to vary work methods and approaches to meet diverse needs of service users Values differences in other people | Where appropriate, challenges other people’s views if they are not in-line with appropriate conduct or CWSX Mind’s Equalities PolicyCommunicates effectively with individuals, appreciating their social, cultural, religious and ethnic backgrounds and their age, gender and abilities  | Upholds personal and professional ethics and values, taking into account the values of CWSX Mind and respecting the culture, beliefs and abilities of individuals | Takes appropriate action if ethics and values are compromised |

**2. Partnerships and Working with Others**

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|  | **Core** | **Skilled** | **Supervisory** | **Management** |
| **2.1 Creating Partnerships with Service Users** | Proactively works with service users in order to provide the best service they, and CWSX Mind, can deliverActively involves and values service users as part of the team Able to maintain solid professional boundaries with service users Able to promote and work diligently to support service users’ autonomy | Develops effective partnerships with service users which support person centred practice and self efficacy  | Identifies and leads opportunities for service user involvement and ways to learn from their experience and feedback | Acts as a role model to all staff at CWSX Mind in creating and promoting partnership working with service users |

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| **2.2 Developing Networks** | Has and seeks positive links with colleagues, service users and people working in partner agencies  | Promotes the sharing of information and resources with team members and managers/supervisorsPro-actively develops links and networks with external partner agencies which can support their work | Identifies and discusses potential opportunities where working in collaboration with others, internally and externally, enhances their workCreates opportunities to bring individuals and groups together to achieve goals, including service users | Represents CWSX Mind externally and internally, creating relevant networks and relationships, to drive CWSX Mind forward |
| **2.3 Building and maintaining relationships** | Gains and maintains the trust, support and respect of colleagues and service users by using sound interpersonal skills Able to demonstrate patience and actively listens and empathises with others recognising different perspectives and points of viewManages positions of power appropriately | Communicates effectively with individuals and groups, and acts as a positive role model Able to use excellent written and verbal communication skills in order to present a positive image of “self” and the service, when communicating with service users and other agenciesand uses tact and diplomacy | Ensures contacts are spread throughout the organisation which represent CWSM as a whole Gains and maintains the trust and support of external networks | Provides powerful and compelling arguments which clearly address the issue and are developed logically from the factsWorks to achieve consensus, rather than force their own direction |
| **2.4 Encouraging contribution** | Respects, values and acknowledges the roles, contributions and expertise of others Confident in suggesting their own ideas Actively considers other people’s suggestions | Actively contributes to creating a respectful working environment which values contributions from all  | Encourages people to engage in decision-making and to constructively challenge Looks for ways to constructively solve problems & disagreements | Employs strategies to manage conflict of interests and differences of opinion |

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| **2.5 Working within teams** | Recognises the common purpose of the team and respects team decisions, contributions and compromisesActively participates in the team in order to generate ideas and to adopt a team approach Has a clear sense of their role, responsibilities and purpose within the team | Aligns team and individual objectives, to enable the team to be efficient, effective and creative | Willing to lead the team in an engaging, encompassing and creative mannerExpresses ideas lucidly and presents arguments and messages to team members both verbally and in writing in a logical and clear manner  | Encourages open, honest and constructive behaviour that helps CWSX Mind to achieveCan inspire a team, involving the right people at the right timeSpeaks persuasively and with conviction and gains the complete attention to those they are addressingSelects the most appropriate means of communication |

**3. Managing Work**

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|  | **Core** | **Skilled** | **Supervisory** | **Management** |
| **3.1 Planning** | Uses appropriate tools (i.e. to do lists, calendars) to plan workload and prioritise effectivelyUses communication effectively to assist planning between managers, team members and service users  | Considers how their own expertise can contribute to planning for themselves, the team and the organisation as a whole Supports and promotes plans for services that are part of the strategy for CWSX Mind | Appraises options in terms of benefits and risksPresents proposals which are logical, practical and persuasiveMonitors and controls implementation of plans to ensure that their objectives are achieved to specification, in time and within budget | Makes a significant contribution to CWSX Mind’s strategic planning Removes duplication and overlap of work effort and gives clear accountability and resources to appropriate functions/teams |

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| **3.2 Managing Resources****(staff, funding, buildings, materials etc..)**  | Ensures services are delivered as efficiently as possible, within available resources and avoiding unnecessary waste | Takes appropriate action when resources are not being used efficiently and effectivelySuggests how resources can be used more effectively and creatively, working collaboratively with service users | Makes sensible contributions for budget setting in relation to constraints of resources Reviews the performance/roles of resources to ensure that planned service outcomes are metMotivates and makes staff feel valued | Inspires others to be creative and generate ideas in order to utilise resources in the most effective manner for service usersContinuously monitorsservice and performance levels, taking swift corrective actionwhen necessary |
| **3.3 Work Contribution** | Ensures set job tasks are met, surpassing minimum requirementsAssists colleagues where possibleCommunicates effectively with managers and colleagues if there are issues with their work and/or deadlinesUses sound communication skills (written and verbal) to maximise work contribution Demonstrates proficient organisational skills and the ability to undertake administrative tasks efficiently and to a reasonable standardHas good IT skills and uses email and the internet appropriately in order to enhance their workIs flexible and adaptable  | Whenever possible, uses initiative with their work and is creative in order to generate new ideas and solutions to problems | Makes a significant contribution to the work outputReaches clear conclusions based on understanding of underlying issuesMakes contingency plans Has excellent verbal and written communication skills  Can deliver administrative tasks efficiently and to a high standard.  | Demonstrates an understanding of critical issues and acts upon them |
| **3.4 Managing Performance & Critically Evaluating** | Takes responsibility/accountability for work performance and takes the opportunity to learn from past experiencesTakes action to improve performanceAcknowledges and is proud of oneself and colleagues when good work and outcomes are achieved for service users | Analyses information from a range of sources, both positive and negative, about their own performance (i.e. self-reflection, colleagues, managers and service users) and acts upon and makes positive changes to their work performance | Assists and supports team members to respond positively to constructive criticism and to develop their roles and responsibilities Encourages team members to take joint responsibility for their achievements and to be proud of theseTakes responsibility for tackling difficult issues with staff members and their performance | Supports supervisors in managing and developing their staffAnalyses and actively seeks information from a range of sources about performance across the whole organisation Supports staff and colleagues to evaluate and audit service user outcomes  |

**4. Continually and Creatively Improving**

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|  | **Core** | **Skilled** | **Supervisory** | **Management** |
| **4.1 Encouraging improvement, creativity and innovation** | Thrives to be creative in their work and generate new ideas in order to assist the best outcomes for service usersObtains and acts on service user feedback and experiences to develop new and existing services | Is confident to make their own suggestions and ideas for improvement and innovation to managers and colleaguesLikewise, must be open to other suggestions even if they conflict with their own ideas | Uses evidence from a range of sources, both positive and negative, to identify options and solutionsAppraises options, plans and takes action to implement and evaluate improvements | Encourages dialogue and debate with a wide range of stakeholders of CWSX MindAct as a positive role model for innovation and inspires others to be creative in their approach to their ideas and work at CWSX Mind |

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| **4.2 Facilitating transformation** | Understands the need for change and continually improvingActs positively and confidently to propose and make changes  | Questions the status quo in order to facilitate the organisation to continually grow and developConsiders change as an opportunity and understands the importance of change Is open, supportive and flexible in their work as well as when presented with change | Acts as a positive role model for innovation, creativity and changeArticulates the need for innovation, creativity and change and its impact on people and servicesMotivates and focuses a team to accomplish innovation, creativity and change | Develops creative solutions to transform servicesLeads, inspires and motivates the staff group to accomplish change and innovation in a creative manner |
| **4.3 Making Decisions** | Acts in a manner consistentwith the values and priorities of CWSX MindContributes their unique perspective to team, department, system and organisational decisionsWhere appropriate, be decisive after considering service users views and feelings | Uses information to challenge existing practices and processes | Carries out analysis against an evidence-based criteria set to make effective decisions | Takes responsibility for making tough or unpopular decisions, demonstrating the reasons has to why these decisions have been made in order to deliver better services Considers potential barriers to decisions with methods in place to overcome these |

I have read and understood the Job Description, Person Specification and Competencies/Indicators required for my role and agree to fulfil the requirements of this role.

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| Signed:Staff member |  | Date: |  |
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| Signed:Line Manager |  | Date: |  |