

## Position Description

### Finance Manager – Full Time

Deadline for applications – **4pm, Friday 15th January 2021**<sup>1</sup>

Interviews for successful applicants selected for second stage will be during **w/c 25th January 2021**

Salary Range £30-36,000 per annum (Dependent on Experience)

Full Time, 35 hours per week. Place of Work – Port Business Park, Gremista, Lerwick.

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| <b>Position Title:</b>        | Finance Manager  |
| <b>Business Unit:</b>         | COPE Ltd   |
| <b>Manager:</b>               | Board of Directors   |
| <b>Purpose of Role:</b>       | To evaluate and monitor the overall financial performance of COPE Ltd whilst leading and developing its finance functions and identifying fundraising opportunities.   |
| <b>Organisational Aim :</b>   | Everyone regardless of disability should have the opportunity to work if they so wish. Given the right conditions, all adults have the potential to contribute to our local economy and in doing so will learn to value themselves and others.   |
| <b>Organisational Values:</b> | <i>Respect</i> - We recognise each other's differences and show consideration for one another.<br><i>Equality</i> - We believe that everyone contributes equally to the success of our organisation and as such will be valued and appreciated.<br><i>Fairness</i> - We are committed to the principles of social justice and opposing prejudice.<br><i>Excellence</i> - We believe in working hard to ensure we are the best we can be for our participants, staff and customers.<br><i>Accountability</i> - We account for our activities, accept responsibility for them, and to share the results in a transparent manner. |
| <b>Reporting Structure:</b>   | The Finance Manager reports to the Board of Directors, but close working with fellow Senior Managers is essential. Position titles that report to the Finance Manager are the Finance and Administration Officers. (Currently two part time  |

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<sup>1</sup> See Page 3 for application process.

positions, one of which will be vacant by 1<sup>st</sup> Jan 2021.)

### **Key Responsibilities:**

Working to deliver the vision, culture, strategic direction, and goals set by COPE Ltd Board of Directors by taking responsibility to:

- 1) Assist the Senior Management Team (SMT) to develop and manage the business activities of COPE Ltd in relation to approved budgets and required insurance and industry standards.
- 2) Own the COPE Ltd Budgeting and rolling forecast model and lead the financial reporting systems of COPE Ltd in conjunction with the organisational business plan, presenting accurate, detailed and accessible financial forecasting, expenditure analysis and information to other members of the SMT and Board of Directors as requested.
- 3) Monitor and analyse revenue margin profitability and recommend appropriate action plans.
- 4) Lead the process of developing a rolling strategic finance plan for COPE Ltd which includes annual earned income and fundraising targets.
- 5) Participate in fundraising for COPE Ltd by providing relevant financial data and working with other members of the SMT to submit funding applications to an agreed plan.
- 6) Lead the yearly Stocktake process in conjunction with the Business Managers to ensure the accurate account of the quantities and condition of items held within the organisation.
- 7) Work with the management team to understand and monitor the range of health and safety requirements of the organisation and to give proportionate attention to each of them.
- 8) Lead the management of accounting and payroll systems, to enable preparation of monthly management accounts for the organisation.
- 9) Manage other members of the Finance and Administration Team to ensure Income and expenditure are recorded accurately and promptly, with timely invoicing and payments, and that cash flow projections are regularly updated.
- 10) Act as a lead liaison with the financial auditor in relation to the preparation and approval of annual accounts and any subsequent reports.
- 11) Act as lead liaison with COPE Ltd Group pension provider to ensure all legal requirements are met.
- 12) Act as lead liaison with external IT providers to ensure sound and efficient internal IT services support.
- 13) Monitor and maintain all relevant OSCR, SORP, VAT, HMRC, Companies House and insurance requirements.
- 14) Work as part of a strong and connected senior management team which promotes organisational values, adherence to policy and procedures and good practice at all times.
- 15) To carry out any other duties required by the Board of Directors in line with COPE Ltd operational plans.

### **Skills Required**

#### **Essential:**

- a) Formal accountancy qualification (ACA/ACCA/CIMA Qualified or Part Qualified Accountant) from a recognised accountancy body OR a minimum of five years' experience in a similar role.
- b) Detail orientated with strong analytical and numeracy skills and the ability to model scenarios and sensitivities. (Experience of: MS Office, SAGE, Xero).
- c) Experience of delivering concise and accurate reports to Trustees, SMT and outside stakeholders and partners to strict deadlines.

- d) Experience in leading teams to manage services within a budget, use initiative, think laterally and to meet deadlines and produce quality work under pressure.
- e) To keep under review efficiencies and how best to adopt them.
- f) Teamwork and empathy with the organisations Core values.
- g) PVG requirement.

**Desirable:**

- a) Experience in building networks and successfully maintain professional relationships.
- b) Understanding of fundraising for a charity or third sector organisation.
- c) Working with volunteers.
- d) A full clean driving licence.

**Competencies required:**

- a) Self-starter with the ability to identify value and add opportunities.
- b) Ability to lead and guide teams to understand how to support an organisation to grow towards financial sustainability.
- c) Well organised, and an ability to meet deadlines.
- d) Ability to promote professionalism and ethics in relation to financial and asset management.
- e) Ability to sustain change by ensuring the availability of necessary resources and information, and by capturing the lessons of both success and failure.

The successful candidate will be in place during a significant period of change following a difficult period and an ongoing re-structure. This will present the candidate with an opportunity to make a real impact on COPE Ltd.

This person will work very closely with the Board and fellow senior managers and become a vital member of the management team.

**APPLICATION PROCESS**

- Please email your Application Form and CV to [john.tait@cope.ltd.uk](mailto:john.tait@cope.ltd.uk) by **4pm on Friday 15<sup>th</sup> January 2021**.
- Should you wish to provide supplementary evidence / information please send as PDFs and restrict these to 2 sides of A4.
- If you prefer to submit a hard copy, this can be addressed to: CONFIDENTIAL, FAO John Tait, COPE Ltd, Port Business Park, Gremista, Lerwick, Shetland, ZE1 0TW.
- Shortlisting is expected to take place immediately after the closing date.
- Applicants successfully being shortlisted will be asked to attend an **Interview during the week commencing 25<sup>th</sup> January 2021**

Scottish Company No: SC186555 | Registered Charity No: SC028022  
Cope Ltd, Port Business Park, Gremista, Lerwick, Shetland ZE1 0TW