**Recruitment Pack**

**Finance and Administration Officer**

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**Covering Letter**



August 2021

Dear Applicant

**Post of Finance and Administration Officer**

Thank you for your enquiry about the above post.

You will find enclosed an application form together with a job description and person specification. There is also some background information about the bureau.

In determining which applicants will be interviewed the Interview Panel will have regard to applicants who best fit the person specification so it is important that you use this as a guide when completing the application form.

We regret that we are unable to acknowledge receipt of completed application forms unless a stamped addressed envelope is enclosed with your application.

We look forward to receiving your application by the closing date of 6th September 2021 at 5pm and we would ask that you provide an email address and telephone number where we can contact you day and/or evening.

Yours faithfully,

Lynda MacLean

Operations Manager

**Organisational Profile**



Western Isles Citizens Advice Service is the major provider of information, advice and assistance in the Western Isles.

We are staffed by trained volunteer advisers under the supervision of the management team, and provide responses to clients’ enquiries covering the whole range of social issues. Despite being a generalist service, most enquiries are concerned with matters related to problems of poverty and deprivation.

The local offices are wholly independent and receive their core funding from Comhairle nan Eilean Siar. We are an autonomous body under the control of a local Board of Directors.

We are members of Citizens Advice Scotland (the Scottish Association of Citizens Advice Bureaux) and, as such, must meet specific conditions of membership related to standards of service and other matters.

Enquiries are across a wide range of fields, and clients expect high quality advice and assistance (including representation at tribunals and in Court when appropriate) on what are, at times, highly complex matters. The main enquiries at the present time relate to problems with welfare benefits and money; employment; goods and services; housing; and family and personal situations.

*Charity Name: Western Isles Citizens Advice Service*

*Charity Number: SC015018*

**Job Description**



Job Title: Finance and Administration Officer

Responsible to: Operations Manager

Line Management: None

Responsible for: The operation of all WICAS office systems and procedures.

**Summary of main responsibilities:**

• To provide administration for WICAS

• Manage and maintain all financial recording systems

• Manage and administer wages, pension, PAYE and NI for all staff.

**Administration**

• To provide day-to-day administrative support to the Managers

• Provide administrative support to the Board of Directors meetings

• Support the Managers with administration of recruitment and HR procedures

• Support the Operations Manager with IT-related issues

• Assist all staff with travel arrangements and bookings

• To maintain and order stationery supplies

• Support the Operations Manager in handling of all bureaux correspondence

• Provide other support to the managers, including gathering information and basic research.

**Finance and payroll (in conjunction with the Operations Manager)**

• Manage and maintain all financial recording systems (QuickBooks and HMRC pay and pension databases)

• Receive and verify invoices and requisitions for goods and services

• Verify that transactions comply with financial policies and procedures

• Prepare, verify and process invoices and coding payment documents

• Input data, monitor budgets on a day-to-day basis for all offices and projects. Highlighting any areas of concern to the Operations Manager

• Produce accurate and up to date financial reports for the Managers and Board as requested

• Manage and administer wages, pension, PAYE and NI for all staff

• Complete payroll functions in order to ensure staff are paid in an accurate and timely manner

• Operate and control the bureaux petty cash system

• Research and source best value utilities services.

**Other duties**

* Undertake any other reasonable duties as requested by the Board or Managers.

**Person Specification**



|  |  |
| --- | --- |
|  | **COMPETENCIES** |
| QUALIFICATIONS | * Good standard of general education. |
| EXPERIENCE | * Experience in using and monitoring office systems and procedures * Working as part of a team * Working with a wide range of people * Experience in finance and payroll administration * Experienced in the use of the Microsoft Office suite and accounting software |
| SKILLS AND ATTRIBUTES | * IT Literate - Good working knowledge of word, publisher and excel and databases and IT systems and accounting * Able to communicate ideas in writing and orally * Ability to use initiative * Attentive to accuracy * Ability to write routine letters * Have sound administration and organisation skills * Able to take accurate meetings of minutes |
| VALUES AND ATTITUDES | * Commitment to team working * Commitment to equal opportunities policies. |
| KNOWLEDGE | * Use of relevant software including word processing, spreadsheet and database. * Working knowledge of book-keeping, accounting and managing budgets * Familiar with PAYE and NI Contributions |
| OTHER | * Must be prepared to work flexibly, be able to travel and attend meetings and training in other locations and to make overnight trips as required. |

**Application Form**



To apply for this role, please complete this application form and send it to

Lynda MacLean

Operations Manager

Western Isles Citizens Advice Service

45 Winfield Way

Balivanich

Isle of Benbecula

HS7 5LH

Or by email to

[Lynda.MacLean@uistcab.casonline.org.uk](mailto:Lynda.MacLean@uistcab.casonline.org.uk)

In order for your application to be considered, please ensure you complete all sections of this form. Please do not send in your CV as we will only consider your completed application form.

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# Candidate Details

Please complete your details below:

|  |  |
| --- | --- |
| Title |  |
| Full name |  |
| Previous name(s) if applicable (please include dates) |  |
| Address |  |
| Email address |  |
| Contact telephone number |  |
| Role applied for |  |
| Where did you see the job advertised? |  |

# General Data Protection Regulation

The Western Isles Citizens Advice Service is aware of its obligations under the General Data Protection Regulation (GDPR) and is committed to processing your data securely and transparently. Our Privacy Notice for Job Applicants sets out, in line with GDPR, the types of data that we collect and hold on you as a job applicant, how we use that information, how long we keep it for and other relevant information about your data. A copy of the privacy notice for job applicants can be found attached. It is important that you read this notice so that you are aware of how and why we are using your data. Please check the box below to confirm that you have done so.

**I confirm that I have read, understood and agree to the Privacy Notice for Job Applicants.**

# References

Any offers of employment with The Western Isles Citizens Advice Service are conditional upon receipt of satisfactory references. Please provide below the names and contact details of at least two referees **covering your last 5 years of employment** (include additional boxes if necessary).

If you have been in full-time education during this time, please provide details of where an academic reference can be obtained.

For each reference, please detail the following information:

**Referee 1**

|  |  |
| --- | --- |
| **Name of referee** |  |
| **Job title of referee** |  |
| **Organisation** |  |
| **Address** |  |
| **Email Address** |  |
| **Contact Telephone Number** |  |
| **Dates employed** |  |

**Referee 2**

|  |  |
| --- | --- |
| **Name of referee** |  |
| **Job title of referee** |  |
| **Organisation** |  |
| **Address** |  |
| **Email Address** |  |
| **Contact Telephone Number** |  |
| **Dates employed** |  |

Please note that we will not contact any referees until an offer of employment has been made and your authorisation has been obtained.

# Right to Work in the United Kingdom

All employees must be able to demonstrate that they are legally entitled to work in the United Kingdom.

In order to apply for employment with the Western Isles Citizens Advice Service, you must declare that you have the right to work in the United Kingdom and that, if successful, you will be able to provide the necessary documentation (typically a passport or a birth certificate, together with your National Insurance Number).

By completing this application form, you are declaring that you are legally entitled to work in the United Kingdom.

**Please state below, by selecting the statement that applies to you, if there are any restrictions or limitations on your legal right to work in the United Kingdom.**

|  |  |
| --- | --- |
|  | I confirm that I have the right to work in the United Kingdom without restriction. |
|  | I confirm that I have the right to work in the United Kingdom until \_\_\_\_\_\_\_\_\_\_\_ and I hold the appropriate Visa documentation to confirm this right. I have no restrictions or limitations on my Visa. |
|  | I confirm that I have the right to work in the United Kingdom until \_\_\_\_\_\_\_\_\_\_\_ and I hold the appropriate Visa documentation to confirm this right. I am restricted to (please detail any restrictions or limitations on working in the UK):  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

# Employment History

Please give details of your employment (paid or unpaid) starting with your present/most recent employer and working backwards. Please explain any employment breaks.

**Present or most recent employer:**

|  |  |
| --- | --- |
| Name, full address & telephone number of employer |  |
| Job title |  |
| Dates employed: from (MM/YY) to (MM/YY) |  |
| Final salary |  |
| Notice period (if applicable) |  |
| Reason for leaving |  |

Please give a brief outline of your main responsibilities and achievements:

**Previous employers: Continue on separate sheet and include additional boxes if necessary**

|  |  |
| --- | --- |
| Name, full address & telephone number of employer |  |
| Job title |  |
| Dates employed: from (MM/YY) to (MM/YY) |  |
| Notice period (if applicable) |  |
| Reason for leaving |  |

Please give a brief outline of your main responsibilities and achievements:

|  |  |
| --- | --- |
| Name, full address & telephone number of employer |  |
| Job title |  |
| Dates employed: from (MM/YY) to (MM/YY) |  |
| Notice period (if applicable) |  |
| Reason for leaving |  |

Please give a brief outline of your main responsibilities and achievements:

If you have had any breaks in your employment (for example family commitments, travel and periods of unemployment) please give the dates to and from and a full explanation.

|  |  |
| --- | --- |
| **Dates** | **Reason for break** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

# Qualifications

Please give details of your qualifications below, beginning with the most recent.

**Education:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Dates** | **Institution name** | **Qualification** | **Grade** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Membership of professional bodies:**

|  |  |  |
| --- | --- | --- |
| **Date joined** | **Professional body** | **Category of membership** |
|  |  |  |
|  |  |  |
|  |  |  |

**Additional qualifications:**

|  |  |  |
| --- | --- | --- |
| **Date completed** | **Course** | **Brief description** |
|  |  |  |
|  |  |  |
|  |  |  |

# Written statement

In this section we would like you to give your reasons for applying for this post. Bearing in mind the job description, please provide examples demonstrating what experience, skills and qualities you would bring to this job. Your statement should not be longer than one page.

# Declaration

I confirm that the information given on this form is, to the best of my knowledge, true and complete. I understand that any deliberate attempt to provide false information to obtain employment is a serious misrepresentation and will lead to rejection, or if employed, dismissal and is likely to constitute a criminal offence.

Signed:

Date:

Print name: