



Head of Local Finance

Thanks for your interest in working at Citizens Advice. This document should give you everything you need to know about the above role.

Want to chat about this role?

Please contact the recruitment team at careers@citizensadvice.org.uk

The team

This team is focused on improving the financial management processes and reporting of Local offices to comply with charity financial reporting (SORP) and Citizens Advice reporting requirements (FHM and Funder reporting)

This team will provide guidance and technical expertise to local leadership, supporting them in making informed financial decisions using reliable financial data.

The team takes a proactive and strategic approach to the improvement of the financial health of the network so that we can ensure our ongoing financial sustainability to achieve our strategic goals as set out in the Advice Strategy.

[Our organisational strategy - Transforming together: trusted advice in times of change](#)

[Our annual reports](#)



The role

To set our strategic approach to how we work with the network to achieve our ambitions set out in the Advice Strategy and Sustainability Objectives. In doing so working closely with Business Development, National Finance, Network Strategy and Change and other teams across the organisation.

To build national understanding of the variation of shape, financial health and funding circumstances across the network. Develop financial and corporate structures that promote service modernisation and change

To develop and lead our approach to developing local leadership and financial management capacity and capabilities to support long term and financial strategic decision making in local services.

To oversee the development and implementation of national strategic goals in relation to the network including how we organise ourselves to deliver financial sustainably

Working collaboratively with other teams, lead and transform how we work to ensure local services have the skills needed for managing a healthy and diverse income profile

Provide and develop standardised financial systems solutions and tools for network use to meet the CA reporting requirements

Develop and maintain the financial health monitoring framework. Ensure we gather network financial data in an efficient manner and share reports transparently to support local and national decision making.

Ensure processes are in place to identify network and local office financial risk

Provide support to help local services deal with any major funding change or challenge.

Ensure financial support provided to local services is consistent, high quality, efficiently and effectively delivered and aligned with our strategic objectives.

This role and team will engage directly with local Citizens Advice leadership and finance staff and the role holder is expected to be a visible and constructive participant within both the wider Citizens Advice senior management team and the senior team of the Finance & Commercial Directorate; and also as part of their external stakeholder engagement.



The organisation

Here are 4 ways you can find out more about us:

1. Citizens Advice Careers Site - <https://www.citizensadvice.org.uk/about-us/job-and-voluntary-opportunities/citizens-advice-job-opportunities/>
2. Citizens Advice LinkedIn - <https://www.linkedin.com/company/citizens-advice/>
3. Citizens Advice public-facing advice website - <https://www.citizensadvice.org.uk/>
4. Find out more through blogs, insights and 'how we help' stories <https://wearecitizensadvice.org.uk/>



Role profile

Band:	Head of Service - Mid	
Salary	£69,664 + London allowance	
Reporting to:	Interim Director of Finance	
Location:	Flexible across England and Wales with regular travel to London and Birmingham	Travel M

<p>Team overview:</p>	<p>This team is focused on improving the financial management processes and reporting of Local offices to comply with charity financial reporting (SORP) and Citizens Advice reporting requirements (FHM and Funder reporting)</p> <p>This team will provide guidance and technical expertise to local leadership, supporting them in making informed financial decisions using reliable financial data.</p> <p>The team takes a proactive and strategic approach to the improvement of the financial health of the network so that we can ensure our ongoing financial sustainability in order to achieve our strategic goals as set out in the Advice Strategy.</p>
<p>Role purpose:</p>	<p>To set our strategic approach to how we work with the network to achieve our ambitions set out in the Advice Strategy and Sustainability Objectives. In doing so working closely with Business Development, National Finance, Network Strategy and Change and other teams across the organisation.</p> <p>To build national understanding of the variation of shape, financial health and funding circumstances across the network. Develop financial and corporate structures that promote service modernisation and change</p> <p>To develop and lead our approach to developing local leadership and financial management capacity and capabilities to support long term and financial strategic decision making in local services.</p> <p>To oversee the development and implementation of national strategic goals in relation to the network including how we organise ourselves to deliver financial sustainably</p> <p>Working collaboratively with other teams, lead and transform how we work to ensure local services have the skills needed for managing a healthy and diverse income profile</p>

	<p>Provide and develop standardised financial systems solutions and tools for network use to meet the CA reporting requirements</p> <p>Develop and maintain the financial health monitoring framework. Ensure we gather network financial data in an efficient manner and share reports transparently to support local and national decision making.</p> <p>Ensure processes are in place to identify network and local office financial risk</p> <p>Provide support to help local services deal with any major funding change or challenge.</p> <p>Ensure financial support provided to local services is consistent, high quality, efficiently and effectively delivered and aligned with our strategic objectives.</p> <p>This role and team will engage directly with local Citizens Advice leadership and finance staff and the role holder is expected to be a visible and constructive participant within both the wider Citizens Advice senior management team and the senior team of the Finance & Commercial Directorate; and also as part of their external stakeholder engagement.</p>	
Key accountabilities	Key elements/Tasks	% of Time
<p>Lead and develop strategy and business plan</p>	<ul style="list-style-type: none"> ● Set our short, medium and long term strategic approach to how we work with the network to achieve our organisational ambitions set out in our strategic plans ● Develop and build national understanding of the shape, financial health and funding circumstances 	<p>40</p>

	<p>across the network so that this can inform strategic direction and improvements.</p> <ul style="list-style-type: none"> ● Set and own our strategy for developing local leadership and financial management capacity and capabilities at a local citizens advice level and work with several other teams to deliver this. ● Lead teams through developments in financial reporting requirements and how we set and deliver our strategic ambitions as a network based organisation efficiently. ● Lead the continuous improvement in collecting and reporting network wide finance data to national teams and leaders. ● Work with colleagues to achieve internal and external understanding of our work, priorities, values and ambition. ● Proactive identification, management and mitigation of financial risks and issues 	
<p>Lead development of organisation-wide capacity</p>	<ul style="list-style-type: none"> ● Build strong links with other teams across the Operations Directorate, Finance and Commercial and the wider organisation to ensure alignment and collaborative working. ● Build effective relationships to support the above with external partners as applicable ● Build effective relationships with colleagues across national and local Citizens Advice service to ensure that our strategy for working as a network based organisation is part of, and actively feeding into, our strategic aims as set out in our strategic plans ● Provide oversight of the service wide financial modelling and reporting requirements of new and existing funded services 	<p>10</p>

<p>Lead a business unit including management and develop staff and ensure the efficient working of the team</p>	<ul style="list-style-type: none"> ● Role-modelling our leadership behaviours of visible, bold, inclusive and accountable. ● Set out a clear vision for the role your team plays in the wider organisation and the delivery of organisational objectives. ● Identify, share and ensure consistency of best practice within and across the service ● Ensure your team and internal stakeholders are kept up to date and informed on performance and progress. ● Set high expectations for performance and help people meet them by developing capability and promoting development. ● Foster a culture in which equity and diversity principles are embedded and well managed. ● Manage poor performance robustly and fairly, within processes, making the most of the organisation’s limited resources. ● Compliance with Citizens Advice policies and procedures, including Health and Safety and Data Protection. <p>Lead on and oversee governance arrangements as required, including:</p> <ul style="list-style-type: none"> ● Participating in leadership meetings. ● Delivering updates on performance, challenges and opportunities ● Making timely and transparent decisions 	<p>20</p>
<p>Financial Management</p>	<ul style="list-style-type: none"> ● Responsible for financial performance of the business unit, including meeting deadlines and complying with budget-setting, forecasting and year-end budget holder responsibilities. ● Demonstrate financial efficiency and value for money throughout the department by configuring 	<p>10</p>

	resources to enable maximum efficiency and effectiveness, and to identify opportunities for reinvestment.	
Other	Deputise for Financial & Commercial Directors as required. Undertake any other duties as may be reasonably required within the scope of the role.	5



Person specification

Essential criteria

1. Qualified accountant (CCAB) or equivalent experience
2. Significant experience of managing financial and operational processes in the Charity sector, with a detailed understanding of the technical requirements of the Charity SORP and statutory agencies e.g. Charity Commission and HMRC
3. Significant experience in financial management, budgetary control and financial reporting.
4. Experience of providing strategic advice and delivering change in complex and fast moving environments
5. Demonstrable experience of building productive stakeholder relationships with an ability to influence and negotiate, particularly in relation to overcoming barriers against business objectives.
6. Experience as a strategic thinker, ability to recognise and navigate the overall operating context of the organisation, and think critically about evidence, business requirements and user needs
7. Significant experience of leading and developing teams.

8. Confident and well-developed verbal, written and presentation skills,
9. Experience in managing and delivering successful change in a business environment, with demonstrable ability to take the lead in improving processes and ways of working within a team and with other teams.
10. Ability to take decisions and solve problems with confidence commensurate with level of post.

Requirements for role (candidates will confirm at application stage and at interview)

1. Ability to lead in line with our organisational values.
2. Proven ability to use IT packages, including Google systems such as Google Docs, Google Sheets, Google Slides, email and maintenance of an electronic diary as well as the ability to use or learn other packages as necessary.
3. Proven ability to keep up to date with learning and development theory and take individual responsibility for learning new technologies
4. Willingness to travel within the UK (including overnights) and to work unsocial hours occasionally to meet tight timescales.
5. Understanding of, and commitment to, the aims and principles of Citizens Advice in which equity, diversity and inclusion are embedded throughout.
6. Awareness that Citizens Advice clients are at the heart of everything we do.