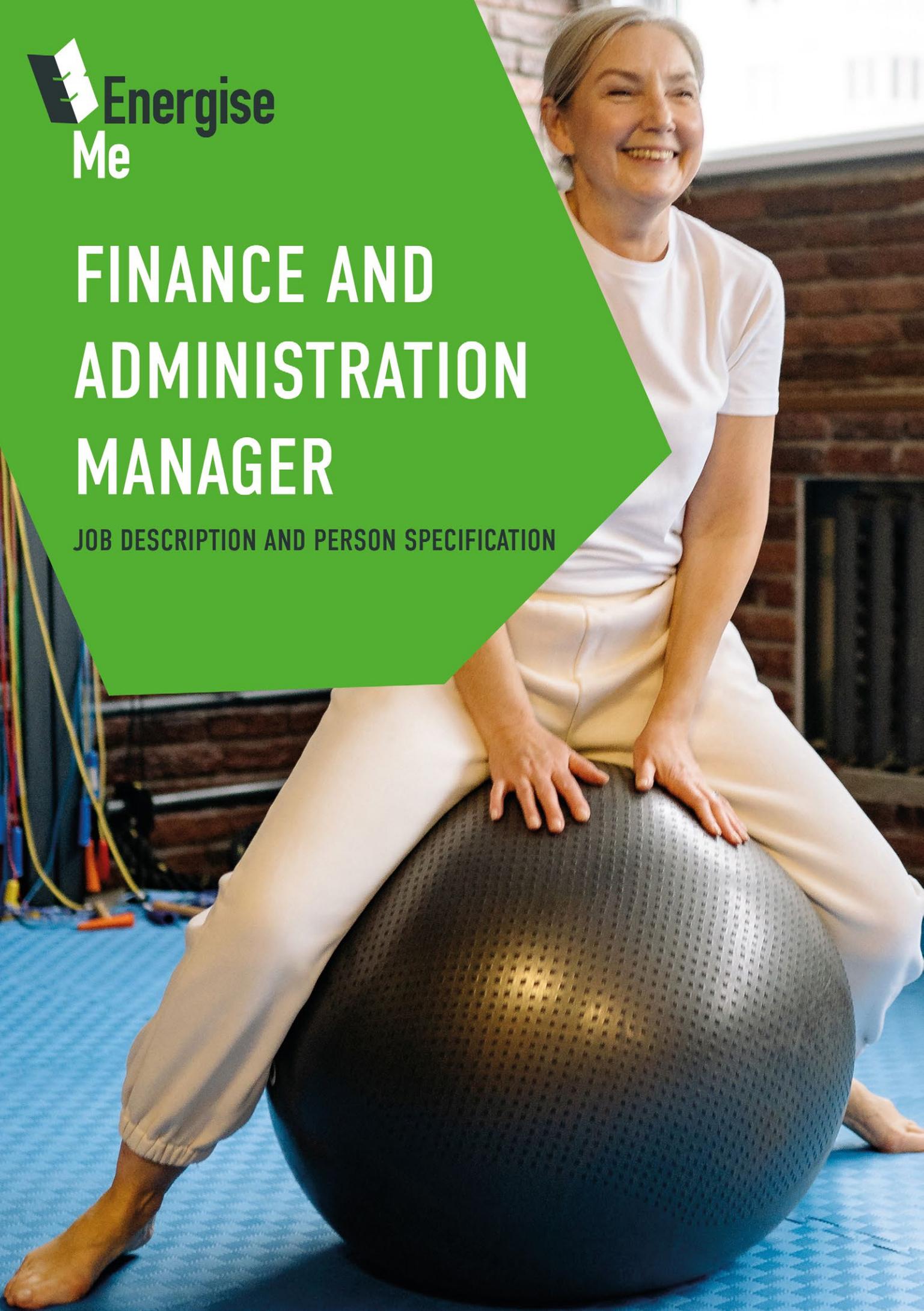




FINANCE AND ADMINISTRATION MANAGER

JOB DESCRIPTION AND PERSON SPECIFICATION



About Energise Me

We tackle the things that prevent active lifestyles, so everyone can improve their health and happiness by moving more.

Physical activity reduces our risk of depression and early death by up to 30%, and our risk of major illness by up to 50%.

We work hard to make it easier for everyone in Hampshire and the Isle of Wight to experience these benefits.

Energise Me is the only local physical activity charity that works across Hampshire and the Isle of Wight to tackle the things that prevent active lifestyles.

We also play an important role in the national physical activity picture. As one of 42 Active Partnerships funded by Sport England, we make sure local voices are heard in national conversations.

Our core funding means we are uniquely placed to coordinate local physical activity strategy. It enables us to support others, encourage collaboration, and to focus on engaging underrepresented communities in physical activity and sport.

We recently worked with over 800 people to launch the [**We Can Be Active strategy**](#) for our area.

Unlike local organisations who deliver physical activity, our work is not tied to specific sports or activities. This gives us freedom to re-imagine physical activity. It means we can be bold and experiment to help our sector learn and grow.

Curious about what stops people from being active

Open to different ideas and perspectives

Creative in how we do things and who we work with

Bold in taking risks and speaking out about things that need to change.

Our People



Our team is made up of seventeen people with the passion and skills to spark positive change.

Between us we have accountancy, arts, charity, events, health, and local authority experience... not to mention more than 100 years of physical activity and sport expertise.

Exciting things happen when you bring people with different experiences and backgrounds together. It helps us to create exciting collaborations that enable positive change in our communities.

Our core team is supported by a board of trustees. Among our trustees are a GP and a

Headteacher who support our work in health and education. Others strengthen our charity with business, research, and finance expertise.

We are passionate about making physical activity and sport more welcoming and accessible to all.

Our recently published [action plan](#) sets out our commitment to improve diversity and inclusion within and beyond our organisation. We have taken action to remove any bias from our hiring process and we are working hard to ensure Energise Me is a safe, inclusive and supportive work environment for all.

We think our people are great but we would say that! Above is an illustration of what the people we work with say about us.

Candidate



We are looking for a qualified accountant with a calm and professional approach.

You will have a strong understanding of accounting policies and packages such as Xero.

Knowledge of The Charities Statement of Recommended Practice (SORP), charity law and VAT will help you stand out from the crowd.

You will have an excellent eye for detail and the ability to think critically and make clear decisions under pressure.

You will have excellent people skills and work well on your own and as part of a team.

We will help our ideal candidate to learn and grow from day one with:

- An induction to help you understand how we tackle the things that prevent active lifestyles
- A learning and development plan to help you deliver impact as a bold leader
- Access to webinars and training through the Active Partnerships Network and other partners
- Opportunities to work across the team on a wide range of projects
- Two volunteering days to learn by doing, out in our communities

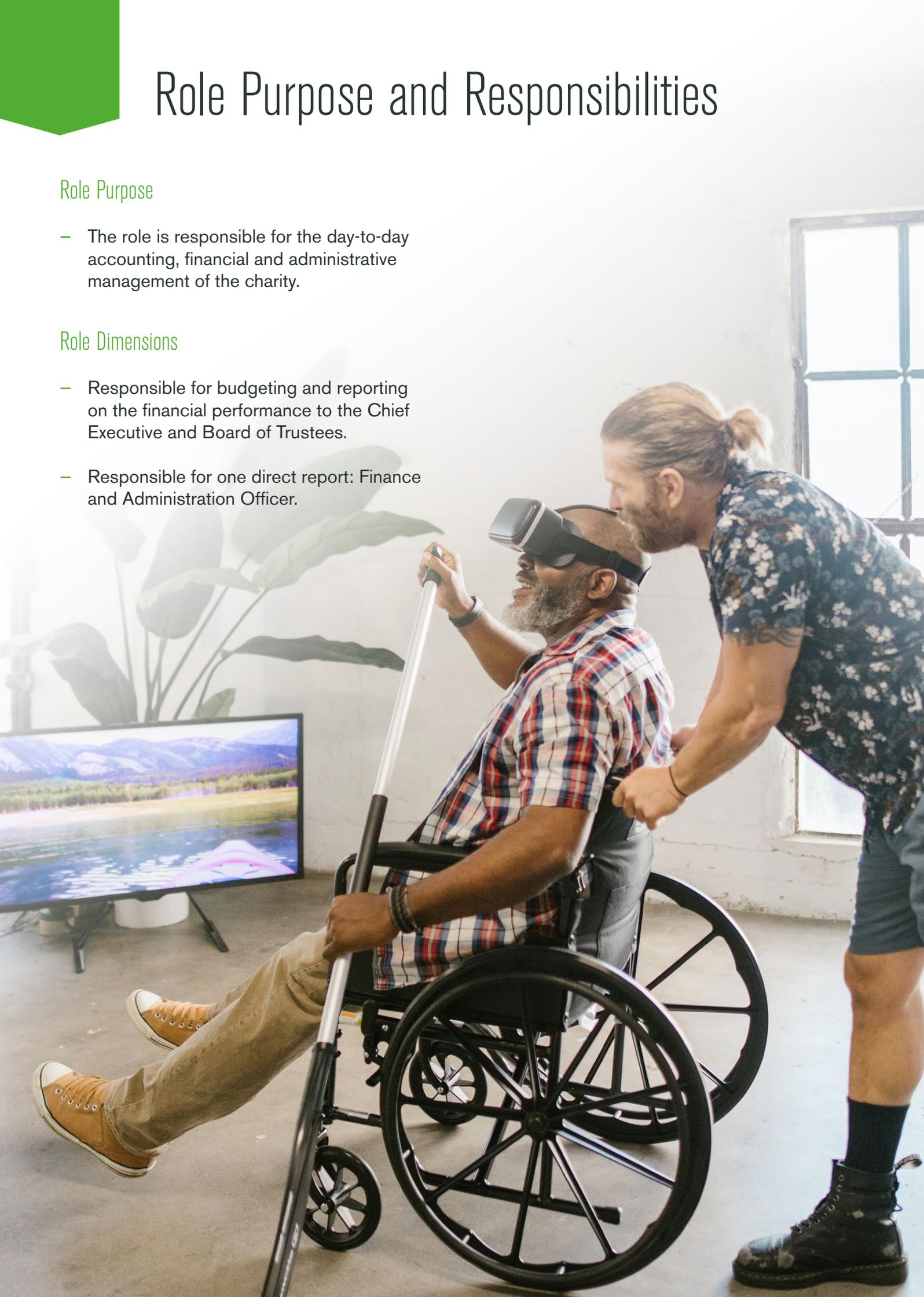
Role Purpose and Responsibilities

Role Purpose

- The role is responsible for the day-to-day accounting, financial and administrative management of the charity.

Role Dimensions

- Responsible for budgeting and reporting on the financial performance to the Chief Executive and Board of Trustees.
- Responsible for one direct report: Finance and Administration Officer.



Main duties and responsibilities

AREA	KEY TASKS	SUCCESS MEASURES
Managing relationships with key organisations and people	<ul style="list-style-type: none">– Maintain and build key relationships with Energise Me team members and Trustees as well as external stakeholders such as Sport England, Charity Commission, and other regulatory bodies.– Act as Secretary for the charity working closely with the Board of Trustees.– Plan and coordinate annual audit and prepare Energise Me's annual Accounts. Manage external auditors and be point of contact for Auditors.– Manage the relationship with the bank and external financial resources.– Manage the Charity's externally invested portfolio.– Prepare information for the Trustee meetings as appropriate.– Manage Payroll.– Manage personnel requirements of the charity, including Employee records, Pay details, and Holiday entitlement records.	<ul style="list-style-type: none">– Strength of relationships with your colleagues and external suppliers.
Financial reporting and budget management	<ul style="list-style-type: none">– Manage Energise Me's financial and accounting functions and related policies, ensuring compliance with all relevant standards, regulations and procedures (Charity Commission guidelines, HMRC, and financial regulations) ensuring that the charity's financial policies and procedures are up to date and robust.– Manage the financial aspects of contracts and other arrangements with service contractors, funders and partners ensuring accurate and timely reporting e.g. completing claim forms for grants, submitting financial returns and reports.– Produce regular management and financial reports as required for the Chief Executive and Board of Trustees.	<ul style="list-style-type: none">– Financial stability and budgets are managed effectively and in line with overall target/costs.– Financial and operations risks are identified, assessed and mitigated where possible.– Timely and professional support is provided to team members to secure investment.

AREA

KEY TASKS

SUCCESS MEASURES

Accountancy
day-to-day
management

- Give detailed support to the preparation of the annual budget, support the creation of budgets for specific projects and support the creation of a three-year financial strategy.

- Exercise strong financial and budget monitoring including preparing monthly management accounts including cash flow forecast and balance sheet.
- Ensure the effective implementation of financial controls within Energise Me and maintain financial procedures which support the effective operation of the charity.
- Ensure prompt and efficient completion of monthly, quarterly and annual returns as required, including submission of end of year returns to Charity Commission, Sport England and other regulatory bodies.
- Complete VAT returns (if appropriate) and ensure compliance with HMRC payroll submission requirements.
- Ensure income is received in full and on time including claiming funds from grant-making bodies by overseeing all financial transactions, invoicing and credit control.
- Authorise Purchase orders, Invoices and payments to suppliers. Authorise Payroll payments and all other external payments.

- Financial stability and budgets are managed effectively and in line with overall target/costs.
- Compliant with Charity Commission Law and UK Sports Governance Code.

Line
management

- Manage, support and develop the Finance and Administration Officer.
- Manage and oversee the Finance and Administration Officer to ensure information on the Xero accounting software is accurate and up to date and undertake bank reconciliation between Xero and the online bank account.

AREA

Policies

KEY TASKS

- Act within Energise Me's stated values and comply with policies and procedures.
- Ensure the Safeguarding and Health and Safety (including Risk Assessment) policies are adhered to and concerns are raised in accordance with these policies.
- Maintain a confidential, sensitive and discrete approach to personal and organisational information, ensuring compliance with relevant data protection legislation.
- Contribute to a culture of equality and demonstrate a commitment to removing all forms of discrimination as a colleague and service provider.
- Keep up to date with development within Finance Administration.
- Developing policy and strategy for Energise Me IT support, maintaining the relationship with the external provider AirIT.

SUCCESS MEASURES

- Policies are supportive of the overall strategic plan and are legally compliant with regular and ongoing due diligence being undertaken by the manager and other members of the team.

Other requirements

- Be flexible in undertaking additional duties commensurate with the role as required.

Person Specification

EXPERIENCE

Qualified Accountant (CIMA, ACCA, CIPFA, ICAEW, ICAS (Scotland), CAI (Ireland)).

Significant financial management and financial administration experience with proven track record of achievement (i.e. timely and accurate monthly and annual accounts, grant and contract management, balance sheet reconciliations, budget setting, forecasting, cash flow, bank reconciliation, purchase ordering, invoicing).

Experience of administrating and managing payroll.

Charity Accounting experience.

KNOWLEDGE

Good understanding and working knowledge of Xero accounting package or similar.

Good understanding of accounting policies.

Knowledge of The Charities Statement of Recommended Practice (SORP), charity law and VAT would be helpful.

Knowledge of data protection policy and legislation and its practical application.

Understanding of equality and diversity, and its practical application.

SKILLS

Good working knowledge of Microsoft Office, advanced Excel skills and knowledge of accounting packages e.g. Xero/Sage.

Understanding of data management.

Good written and verbal communication skills.

PERSONAL ATTRIBUTES

Excellent time management with the ability to effectively oversee and manage a wide range of tasks and priorities.

A calm and professional working attitude with strong interpersonal skills to establish and maintain good working relationships.

Strong attention to detail and analytical skills including the ability to think critically and make clear decisions.

Ability to communicate effectively on a one-to-one basis, in groups, through presentations and thorough formal reports.

Ability to assess priorities, work to strict deadlines and to work independently and as an effective team member.

VALUES

Ability to demonstrate an understanding of and connection with our organisational values:

Curious about what stops people from being active

Open to different ideas and perspectives

Creative in how we do things and who we work with

Bold in taking risks and speaking out about things that need to change

OTHER

Interest in physical activity and sport for health.

How to apply

To apply for this role, you will need to complete a short application via our online recruitment platform, Applied.

You will need to answer a small number of questions that relate to the job description and person specification. These are designed to test your ability to do the job rather than your experience.

Your answers will be anonymously reviewed by three of our team to ensure fairness.

Deadline for applications: **12 noon, Monday 18 July 2022**

Interviews will take place in Winchester week beginning: **25 July 2022**.

For an informal chat about the role, please contact Julie Amies at Energise Me:

julie.amies@energiseme.org

If you require this job pack in an alternative format, please let us know.

APPLY

Terms and Conditions

Responsible to:	CEO
Responsible for:	Finance and Administration Officer
Location:	Winchester two days per week, with the option to work remotely the rest of the time.
Salary range:	£40-£45k per annum (pro rata), depending on experience.
Contract:	Permanent
Notice period:	Two months on either side following successful completion of six-month probation. One week during probation.
Hours of work:	28 hours per week, worked flexibly to fit in with the needs of the role.
Holiday:	25 days paid holiday per year plus Bank and public holidays. After 1 full holiday year of service you will be entitled to 1 extra day of leave per year, up to a maximum of 3 extra days after 3 completed years of service.
Pension:	Energise Me will pay 10% employer contribution.
Life Assurance:	3 x Salary Life cover for all employees automatically from date of employment underwritten by AIG Life Ltd.
Eligibility:	Applicants must have the right to work in the UK.



APPLY NOW

JOB DESCRIPTION AND PERSON SPECIFICATION

