



**Cranfield Trust
Finance Officer
Recruitment Pack**

May 2021

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Welcome to Candidates

From Amanda Tincknell CBE, Chief Executive Officer



I hope you will be interested in joining our team at Cranfield Trust. The last year has been one of significant change, but some real positives have come out of our lockdown experience.

We've been able to reach more charities than ever before, thanks to the generosity of our volunteers, the commitment of our staff team and the technology that have enabled us to deliver webinars to over 3,000 delegates and continue delivering mentoring and consultancy assignments with over 500 charities.

We've helped our charity clients to adapt and survive in this difficult time, and are committed to doing all we can to sustain vital charity services as we come out of the pandemic.

It's a busy and exciting time to join our team: we've got ideas and plans to take Cranfield Trust forward, building on our successful activities and continuing to innovate in the service of welfare charities across the UK. I am looking forward to welcoming new team members and to discussing the role of Finance Officer with you.

APPLICATION PACK FOR FINANCE OFFICER

Closing date: Monday 14th June 2021

Part Time - 2 days per week

Office-based (Romsey)

Salary: £28,000 - £30,000 per annum pro-rata

ABOUT CRANFIELD TRUST

Cranfield Trust is the UK's leading provider of pro bono management support to the voluntary sector. An independent charity, focused on welfare causes, we have a 32-year track record of supporting UK-based charities and non-profit organisations. We work with our register of 1,400 highly skilled commercial sector volunteers and our funders and donors, to provide high value, independent services and advice to local and national charities across the UK.

We offer a range of management services to help build successful charities, including pro bono [Management Consultancy](#), [Mentoring](#) for charity Chief Executives and managers, Peer to Peer support groups, [Webinars](#)/masterclasses and [online resources](#) on a range of management topics. This year, we expect to start around 400 new consultancy and mentoring assignments, and in total, our services will reach around 4,000 charities.

Organised on a regional basis, our face-to-face services have transferred effectively to remote delivery during the Covid-19 pandemic, and our challenge for the next twelve months is to achieve a mix of delivery channels which provide charities with the most effective support.

The Trust's activity has grown, doubling in size over the last five years. The pandemic has been a period of innovation and rapid development as we have moved to start planned services quickly, to provide more support to charities and their leaders. At present (May 2021), our consultancy and mentoring assignments together are 40% ahead of expected levels.

We have not furloughed staff or downsized during the pandemic, and are moving back to a growth path in Spring 2021. We are ambitious in our plans, investing in our current services and developing new activities to meet the needs of the small to medium sized charities we serve.

Our History

The Trust was founded at the suggestion of HRH The Princess Royal on a visit to Cranfield University in 1988. At her challenge, staff, students and alumni of Cranfield University formed the Trust in 1989 to harness the skills developed at the university to benefit the voluntary sector. The Princess is our Patron, and we retain a strong, although independent, relationship with Cranfield University. We recruit volunteers through a range of contact networks including business school alumni groups and professional bodies.

2020-25 Strategy

Over the past five years, Cranfield Trust has more than doubled in size - in terms of the number of charities we support and in financial terms. We have a strong and growing reputation, and are respected for the high calibre of support we provide, thanks to our highly skilled staff team and the 1,400 volunteers who give their time to work with us.

“Cranfield Trust provide the type of support which positively changes an organisation. It's more than training or consultancy that can be fleeting, it helps embed the change that the charity needs to help it help its beneficiaries.” **Equal Arts in Newcastle**

Over the next five years, we will build on our strong foundations - excellent services, successful fundraising, strong volunteer recruitment and effective management - to provide vital services and support for organisations and leaders at a time when welfare charities have never been needed more.

We will:

- Further develop our successful Consultancy service for charities.
- Develop our Mentoring and Peer to Peer services, providing support for charity leaders.
- Develop a substantial learning centre, formalising our webinars into a programme covering charity management essentials and topical learning events.
- Leverage our experience in charity management to provide learning and insight, contributing to the wider voluntary sector, as well as informing our own development.

The Trust will also invest in technology to achieve economies in service delivery and management. We will work to ensure that our own organisation reflects the diversity of our society and develop our staff and volunteers so that the Trust is a great place to work, and an attractive volunteering option for commercial sector professionals.

“Nick [our Project Manager] has been brilliant, whoever works with him in the future will really benefit. Working with Cranfield Trust gave me the opportunity to have some ‘critical friend’ support in a formalised and agreed way which meant commitment and clear access from both sides, so I knew that I would access quality support rather than receiving support as a ‘favour’ from other contacts.”

Weston Park Cancer Charity, Yorkshire + Humber

ABOUT THIS ROLE

Cranfield Trust has been providing high calibre management support to frontline voluntary organisations for more than thirty years. We start new consultancy and mentoring projects with more than 400 charities each year. We are committed to enabling charities to be effectively managed and to support people experiencing poverty, disability or social exclusion and are keen to find the right person to join our team.

We are looking for a highly capable financial professional to join us as a Finance Officer to ensure the smooth running of the day to day transactional finance processes of the charity. In particular, a large part of the role will involve payroll, the timely payment of suppliers and expenses, monitoring of bank accounts and posting of transactions using Sage.

You will need to be methodical, highly organised and with excellent attention to detail, showing initiative and self-motivation in carrying out routine tasks, often to deadlines.

The Finance Officer will report to and assist the Head of Finance, Administration and Control. This role is part of the Finance and Administration Team, and will work closely with other colleagues across the organisation, including the Development Team, who are responsible for fundraising and stewardship of donors. A key aspect of the role will be providing high quality and timely information to the management team on budget and financial spend, as well as information on

service costs. Whilst this is a busy and dynamic charity, there are not a high number of financial transactions so some of the role will focus on areas for system and process development, such as improvements in project accounting and how we use information. This will be a good opportunity for a keen systems-oriented individual with strong initiative.

Cranfield Trust has a number of strong partnerships with grant-making trusts and foundations. We have worked with many of our current funders for some years, and often work together, offering programmes of support to charities receiving funding from a foundation, and management support from the Trust. Part of this role will support the Operations Team in providing financial information on restricted funds, project activities and linking funds to programme deliverables.

The role will normally be office-based in Romsey (subject to the Trust's COVID-19 response) but consideration will be given to requests for flexible and remote working for part of the time.

Closing date: Monday 14th June 2021

Interview date: w/c 28th June 2021 (to be arranged)

Role Description

Role: Finance Officer
Reports to: Head of Finance, Administration and Control (HFAC)
<p><u>Main Purpose of Role</u></p> <p>To manage the day to day financial activities of the Trust, in line with the strategy and policies set out by the Board and Chief Executive and as directed by the Head of Finance, Administration and Control (HFAC).</p>
<p><u>Key Objectives</u></p> <ul style="list-style-type: none"> • To support the HFAC, Chief Executive and Honorary Treasurer on the financial management of the Trust. • As part of the Trust's Finance function, working in close cooperation with the HFAC, to manage the Trust's financial and accounting functions.
<p><u>Key Activities</u></p> <ul style="list-style-type: none"> • contribute to the preparation of monthly management accounts and other regular financial reports to colleagues to monitor the overall financial performance of the Trust; • assist with the preparation of financial plans and budget for the Trust; • assist with month and year-end 'closedown' processes and the preparation of schedules, postings and journals as required • monitor the collection of monies due to the Trust, and their placement in bank accounts falling within the Trust's reserves and investment policies; • liaise with the Trust's insurers, auditors and bankers as required; • administer the Trust's insurance arrangements; • manage the Cranfield Trust pension scheme arrangements and to research and recommend pension schemes; • record correctly all payments made to and from the Trust, its asset holdings and liabilities;

<ul style="list-style-type: none"> • collate and perform analysis on project-related activities to enable a wider understanding of the Trust’s costs, and to assist with funding proposals; • review financial procedures, controls and reports to give assurance about the state of the Trust’s financial position. In support of this, to be aware of professional financial standards in the voluntary sector and apply them as appropriate within the Cranfield Trust, specifically, in terms of financial planning, decision making, financial controls and recording as well as risk management and control, financial data and information management; • arrange payment of all the Trust’s liabilities, by using the Trust’s framework of payment authorisations; • monitor the adequacy of accounting software, making recommendations for software to meet statutory requirements and efficient processes and procedures; • manage the Trust’s payroll processes and reporting, staying current with changes and new requirements, report and make payments to HMRC where required for PAYE, NIC and VAT; • stay current on regulatory requirements and advise the Trust appropriately to ensure compliance; • regularly review, document and report to the HFAC on the Trust’s exposure to risk; • assist with the recording of asset registers and the calculation of depreciation; • undertake any other duties that may be reasonably requested, commensurate with ability and experience
<p><u>Other Responsibilities</u></p> <ul style="list-style-type: none"> • To contribute to a safe working environment for self and others in accordance with relevant Health & Safety legislation and the Trust’s policies; • To share, process and retain information within relevant Data Protection legislation and the Trust’s policies.

Person Specification

Professional Experience	
Monthly payroll and pensions processes and submitting HMRC RTI	Essential
Regular transactional bookkeeping, postings, bank reconciliations, journals	Essential
Sage Line 50 Accounts	Essential
Preparing monthly management accounts pack for senior managers	Desirable
Preparing and maintaining budgets, costings and financial models	Desirable
Experience of implementing and using different accounting systems	Desirable
Using a CRM system, ideally Salesforce	Desirable
Knowledge & Qualifications	
Minimum AAT Advanced Diploma in Accounting (Level 3) or equivalent	Essential
Intermediate to advanced Excel user (macros, formulae, complex workbooks)	Essential
Knowledge of the voluntary sector	Desirable
Understanding of FRS102 Charities SORP accounting requirements	Desirable

Understanding of gift aid, fund and project accounting	Desirable
Understanding of project accounting	Desirable
Aptitude, Skills and Competencies	
Excellent data collection and analysis skills, with excellent attention to detail	Essential
The ability and willingness to undertake methodical administrative tasks, managing information and processes with attention to detail	Essential
Highly organised, with the ability to maintain multiple activities in parallel	Essential
Good literacy, numeracy and IT skills, proficient in MS Office applications	Essential
Demonstrable initiative and interest around system and process development	Desirable
Behaviours (including circumstances)	
Self-motivated, and able to work independently with initiative	Essential
Ability to meet deadlines and work calmly under pressure	Essential
Determined and committed to high quality standards	Essential
Willingness to work positively in a team environment and uphold the charity's values	Essential
A genuine passion to see Cranfield Trust succeed in its objectives	Essential
A helpful, happy and kind person, keen to help others	Essential
Keen to identify your own job-related development and training needs	Essential

Summary of terms and conditions of employment

This is a part-time, permanent post.

Salary: £28,000 - £30,000 (pro-rata) plus 3% employer pension contribution

Location: This role is normally office-based in Romsey (subject to Covid-19 restrictions) but requests for some flexible working will be considered.

Hours of work: The post holder will be employed full-time for 15 hours per week (flexible working arrangements will be considered).

Annual leave: Annual entitlement of 33 days / 247.5 hours (on a pro rata basis for part-time staff) inclusive of Bank/Public Holidays. The office is closed during the Christmas break and annual leave must be taken during this time.

Probationary period: There will be a six-month probationary period.

Policies and procedures: We have policies designed to ensure the safety and well-being of both workers and volunteers e.g. health and safety.

Recruitment and Selection Process

How to apply:

If you are interested in joining us, please send a CV and a cover letter, which will explain why the role is of interest to you and your suitability as a candidate for the role. Please send this by email to recruitment@cranfieldtrust.org no later than **Monday 14th June 2021**.

For ease of reference, please write your name and the job role you are applying for in the subject line of your email.

First-round interviews are expected to take place the week commencing **Monday 28th June 2021**.

To discuss the post informally, please contact **James Lennard** via recruitment@cranfieldtrust.org.

Cranfield Trust is an Equal Opportunities employer. This means that when carrying out our work and in the employment of staff to undertake this work, we will seek to ensure equality of treatment for all persons regardless of ethnicity, gender, age, marital status, disability, religion, sexual orientation, or economic status.

Pre-employment checks:

We will require a minimum of two appropriate references and will check original documents proving your qualifications, identity, and right to live and work in the UK before you can start work with us. You will be asked to provide details of any unspent criminal convictions.

References

References should be your present and last employer. They should have had either managerial or supervisory responsibility for your work, and not be colleagues, subordinates or friends. Referees will be provided with a copy of the job description and person specification for the vacancy. Cranfield Trust will only approach your referees once an offer of employment has been made.

How we use your personal information:

The information which we gather from you during the recruitment and selection process is retained and processed in accordance with the provisions set out by the General Data Protection Regulation (EU) 2016/679 (GDPR) and any national implementing laws, regulations and secondary legislation, as amended or updated from time to time, in the UK, as well as any successor legislation to the GDPR and Data Protection Act 1998.

Please note that by submitting an application for employment, you are also agreeing to the Cranfield Trust processing such information as may be necessary to assess your application, provided that proper regard is had to the data protection principles in force and in accordance with our Privacy Notice in respect of Employees, Workers and Contractors (see attached).

If your application is successful, the information you provide will be retained and will form part of your personnel file. If you are not offered work with the Cranfield Trust, all documentation related to your application will be confidentially destroyed after a period of six months.

Equal Opportunities Monitoring Form

PRIVATE AND CONFIDENTIAL

Cranfield Trust welcomes applications from all parts of the community. The Trust operates an Equal Opportunities Policy and no person will be discriminated against whilst seeking employment or during such employment with the Trust on the grounds of any protected characteristics such as age, disability, ethnic origin, gender, marital status, political allegiance, race, religious belief, sexual orientation, responsibility for dependants, or unrelated spent criminal convictions.

We ask you for information to monitor the diversity of our workforce, and to ensure that we are working equitably.

The following information will be kept strictly confidential and stored separately from the application form before short-listing takes place. It will not form any part of the recruitment process or decision to appoint and will be used to provide data for monitoring purposes only.

You may choose to leave any or all questions unanswered.

POST APPLIED FOR:			
FULL NAME:			
AGE:		DATE OF BIRTH:	
GENDER (Please circle/cross out as appropriate):	MALE/FEMALE/ TRANSGENDER/ OTHER (Please specify) _____	IS THIS THE SAME GENDER YOU WERE ASSIGNED AT BIRTH?	<input type="checkbox"/> Yes <input type="checkbox"/> No (please tick/double click to select)
MARITAL STATUS (Please circle/cross out as appropriate):	MARRIED/CIVIL PARTNERSHIP/SINGLE/DIVORCED/LIVING WITH PARTNER/OTHER		
DO YOU HAVE RESPONSIBILITY FOR DEPENDANTS (e.g. children, elderly, or any other person for whom you are the main carer)?	<input type="checkbox"/> CHILDREN <input type="checkbox"/> ELDERLY <input type="checkbox"/> OTHER <input type="checkbox"/> NOT APPLICABLE		
DISABILITY Do you consider yourself to have a physical and/or mental impairment as defined by the Equality Act 2010/ Disability Discrimination Act 1995 (NI)?	Yes <input type="checkbox"/> No <input type="checkbox"/> (please tick/double click to select) Please give details if you wish:		
ETHNIC ORIGIN How would you describe your identity?	WHITE: <input type="checkbox"/> BRITISH <input type="checkbox"/> ENGLISH <input type="checkbox"/> IRISH <input type="checkbox"/> SCOTTISH <input type="checkbox"/> WELSH OTHER (PLEASE SPECIFY): _____		

	<p>Continues on next page</p> <p>MIXED:</p> <p><input type="checkbox"/> WHITE AND BLACK CARIBBEAN</p> <p><input type="checkbox"/> WHITE AND BLACK AFRICAN</p> <p><input type="checkbox"/> WHITE AND ASIAN</p> <p>OTHER (PLEASE SPECIFY): _____</p> <p>ASIAN, ASIAN BRITISH, ASIAN ENGLISH, ASIAN SCOTTISH ASIAN IRISH OR ASIAN WELSH (Delete as applicable):</p> <p><input type="checkbox"/> INDIAN</p> <p><input type="checkbox"/> PAKISTANI</p> <p><input type="checkbox"/> BANGLADESHI</p> <p>OTHER (PLEASE SPECIFY): _____</p> <p>BLACK, BLACK BRITISH, BLACK ENGLISH, BLACK SCOTTISH, BLACK IRISH, BLACK WELSH (Delete as applicable):</p> <p><input type="checkbox"/> CARIBBEAN</p> <p><input type="checkbox"/> AFRICAN</p> <p>OTHER (PLEASE SPECIFY): _____</p> <p>CHINESE, CHINESE BRITISH, CHINESE ENGLISH, CHINESE SCOTTISH, CHINESE IRISH, CHINESE WELSH (Delete as applicable):</p> <p><input type="checkbox"/> CHINESE</p> <p>OTHER (PLEASE SPECIFY): _____</p> <p>OTHER ETHNIC ORIGIN: (PLEASE SPECIFY): _____</p>		
RELIGION/CULTURAL BACKGROUND	<p><input type="checkbox"/> NONE</p> <p><input type="checkbox"/> CHRISTIAN</p> <p><input type="checkbox"/> BUDDHIST</p> <p><input type="checkbox"/> HINDU</p> <p><input type="checkbox"/> JEWISH</p> <p><input type="checkbox"/> MUSLIM</p> <p><input type="checkbox"/> SIKH</p> <p>OTHER (PLEASE SPECIFY): _____</p>		
WHERE DID YOU SEE THIS POST ADVERTISED?			
SIGNATURE (not required):		DATE:	

Thank you for taking the time to complete this form.

PLEASE RETURN COMPLETED EQUAL OPPORTUNITIES FORM TO:

recruitment@cranfieldtrust.org