

FINANCE MANAGER

Collaboration | Empowerment | Innovation | Integrity | Passion

CHANGEWORKS.



**Collaboration,
empowerment,
innovation, integrity
and passion are the
values which shape
our behaviours
and actions.**

Dear candidate

I'm Matthew Lambwell at Changeworks, and I'm delighted you're considering coming to join us on our mission to decarbonise Scotland's homes.

You would be joining us at a very exciting time for Changeworks. Building on our 35 years of experience in delivering high-impact solutions for low-carbon living, our new strategy will see us grow and scale up our work. This role will play a key role in that.

Joining a small team of financial professionals, you will help to develop and improve our financial processes and systems. The successful candidate will be responsible for the efficient and effective running of Changeworks' finance function. You will be the primary point of contact for managers on their financial performance, providing financial advice and support. You will also manage and help develop our Finance Officer and Finance Assistant.

I look forward to meeting you and talking more about our vision, and how you can fit

Kind regards,

Matthew
Hiring Manager

The application process	
Application deadline	11am, Monday 6 January 2025
Interview date	Week commencing 13 January 2025
Interview location	First interview: Online via Microsoft Teams. Second Interview in person: Orchard Brae House
Interview format and length	First Interview: 45 Minute formal interview competency/scenario based question. Second Interview: 15-minute test and 1-hour conversational based interview.

Contact details	
General enquiries about this job	Reception 0131 555 4010
For an informal discussion about this job	Matthew Lambwell, 0131 539 4125

Job Description	
Job title	Finance Manager
Job reference	FM
Salary and grade	B4 Point 41 to 44 (£46,644 to £50,180) per annum + 8% employer pension contribution
Location of job	Edinburgh (hybrid of home and office working, minimum 2 days per week in the office)
Hours and terms	35 hours per week. Full time permanent
Holiday terms	26 days per annum + 9 public holidays

General terms and conditions	
<ul style="list-style-type: none"> • Changeworks operates a flexi-time system with core hours. There are no overtime payments for this post. • You may need to undergo a Disclosure Scotland check depending on the requirements of the post. Depending on the nature of any convictions that may be disclosed, Changeworks reserves the right to terminate employment with or without notice. • All of the responsibilities outlined below will be reviewed and modified as necessary through consultation with line managers. 	

Responsible to	Head of Finance
Responsible for	Finance Officer and Finance Assistant

Purpose of the job	The Finance Manager is responsible for the efficient and effective running of the charity's finance function and ensuring financial reports are produced in an accurate and timely manner.
Main objectives and goals	<ol style="list-style-type: none"> 1. Provide accurate and timely financial information to assist executive, senior management and budget holders with effective decision making. 2. Ensure finance functions run effectively and efficiently. 3. Develop, implement and improve finance systems 4. Ensure the charities VAT position is correct and properly administered 5. Payroll and pension administration. 6. Other duties as commensurate with the role, as agreed with the Head of Finance.

1. Provide accurate and timely financial information to assist executive, senior management and budget holders with effective decision making.

- Preparation of accurate monthly management accounts and forecasts to agreed timetables.
- Support budget holders and managers in their understanding and interpretation of the management accounts, collaboratively creating forecasts so senior management have the most up to date financial information available.
- Collaborate on the preparation of annual budget and longer-term financial projections.
- Support the Head of Finance, Finance Director, and other Senior Managers in carrying out of their financial management by the provision of a proactive finance service.
- Assist project managers with ad hoc reports, budgets and grant applications.
- Produce finance reports for submission to funders and contractors.
- Raise material issues and concerns with Head of Finance.

2. Ensure finance functions run effectively and efficiently.

- Line management of Finance Officer and Finance Assistant, including training, personal development and performance management.
- Supervision of purchase ledger, sales ledger and cash book.
- Successful completion of month end processes, journals (including allocation of timesheets) and reconciliations.
- Responsible for credit control.
- Day-to-day treasury management and assist Head of Finance with longer-term treasury and investment management.
- Preparation of financial information and backing documentation for annual external audit.

3. Develop, implement and improve finance systems

- Develop, implement and improve operational financial procedures appropriate to the organisation – including finance system, expense system and other ancillary systems.
- Document and maintain financial procedures.
- With Head of Finance and Finance and Resources Director, produce and maintain finance policies.
- Continually improve finance functions - maximising the use of appropriate IT and other

systems, including links between finance system and other data sources (such as Power Platform).

- Proficient use of excel (advanced functions) to manipulate data for reporting and processing.
- Assist Head of Finance in developing the financial expertise and confidence of managers and staff.
- Encourage and display innovation within reporting and systems design.

4. Ensure the charities VAT position is correct and properly administered

- Assist Head of Finance in ensuring the charity continues to comply with VAT regulations – keeping up to date with emerging regulations and best practice, for example CIS scheme
- Advise managers and staff on correct VAT treatment of different income and expenditure items, particularly those involved in tenders and bids.
- Ensure correct calculation and payment of quarterly VAT – and year-end reconciliation, including partial exemption calculations.

5. Payroll and pension administration.

Note – Changeworks uses an external payroll agency, with HR being responsible for information provided to the bureau.

- Ensure salaries are paid accurately and reconciled monthly.
- Ensure all payroll-related payments (i.e. tax, pension and other deductions) are made accurately and reconciled monthly.
- Process payroll and salary-based overhead journals.

Jointly with HR:

- Investigate and resolve payroll & pension queries and errors.
- Check monthly bureau reports for accuracy and completeness.
- Calculate annual pay awards and increments.
- Correctly implement changes to pension contributions.

6. Other duties as commensurate with the role, as agreed with the Head of Finance

- As a dynamic and growing organisation, the roles and responsibilities of key personnel do change over time.
- The charity is actively seeking to move into new services and delivery structures, which will present both challenges and opportunities for the postholder

Key contacts

- Head of Finance.
- Finances and Resources Director.
- Senior Managers and budget holders.
- Banks (various).
- Business development staff.
- Funders and contractors (finance contacts).
- Dataplan - external payroll provider.
- HMRC.
- Standard Life – pension provider.
- External support teams.

Mandatory training/qualifications associated with this role:

- Full or substantial progress towards full membership of a professional accountancy body

Person specification		
Please explain how you meet the following criteria in your job application		
	Essential	Desirable
Qualifications		
Relevant degree of other higher qualification.		X
Full or substantial progress towards full membership of a professional accountancy body or significant experience as a Finance Manager.	X	
Experience		
Understanding of financial management in charity sector.		X
Demonstrable experience of financial management in commercial sector.		X
Significant experience of providing advice and support to managers to support decision making.	X	
Proven experience of effective and timely reporting of financial information.	X	
Relevant experience line managing junior finance team.		X
Skills		
Excellent communication skills and ability to communicate with a broad range of people including explaining complex financial information to non-finance professionals.	X	
High level of computerised finance systems and excel skills.	X	
Ability to work to tight deadlines.	X	
Personal qualities and attributes		
A team player.	X	
Passionate and interested in helping people.	X	
Ability to work with minimum supervision.	X	
Be meticulous with an eye for detail.	X	
Additional requirements		
Interest in environmental and sustainable development issues.	X	

Staff Expectations of Management Experience

The post holder should expect and be open to:

- Effective leadership.
- A positive, honest and enthusiastic working environment.
- Being empowered to effectively achieve objectives and goals within your role
- To be treated fairly and with respect.
- Regular and appropriate feedback through 1-2-1 meetings and annual appraisal and associated processes.
- Having the opportunity to feedback to manager regularly and through the annual 360 process.
- Adhering to all appropriate Changeworks policies to ensure consistency and fairness and health and safety of you and your colleagues.

Complexity

The post holder must be able to:

- Instil Changeworks values within your role and team.
- Adhere and advocate the Changeworks manager values and competencies.
- Demonstrate flexibility and versatility.
- Manage a number of different requirements and requests at the same time.
- Interact effectively with key staff and partners.

Creativity

The post holder will be required to:

- Use their own initiative to provide the best possible outcomes over a wide range of projects.
- Develop new solutions in support of projects.
- Identifying areas for improvement.

Special conditions

- Some out-of-hours, overnight stays and weekend working may be required, for which time off in lieu will be given.



WHO WE ARE

Changeworks has been leading the way in delivering high impact solutions for lowcarbon living for over 35 years. We work with government, local authorities, housing associations, businesses, community groups and individuals to make it happen.

We work for a positive low-carbon reality for everyone, ensuring a just transition for all towards a green economy and society. This will require a sustainable low-carbon society that seeks to reduce the scourge of fuel poverty. Tackling inequalities is core to this mission, as is addressing high levels of emissions among the most well off.

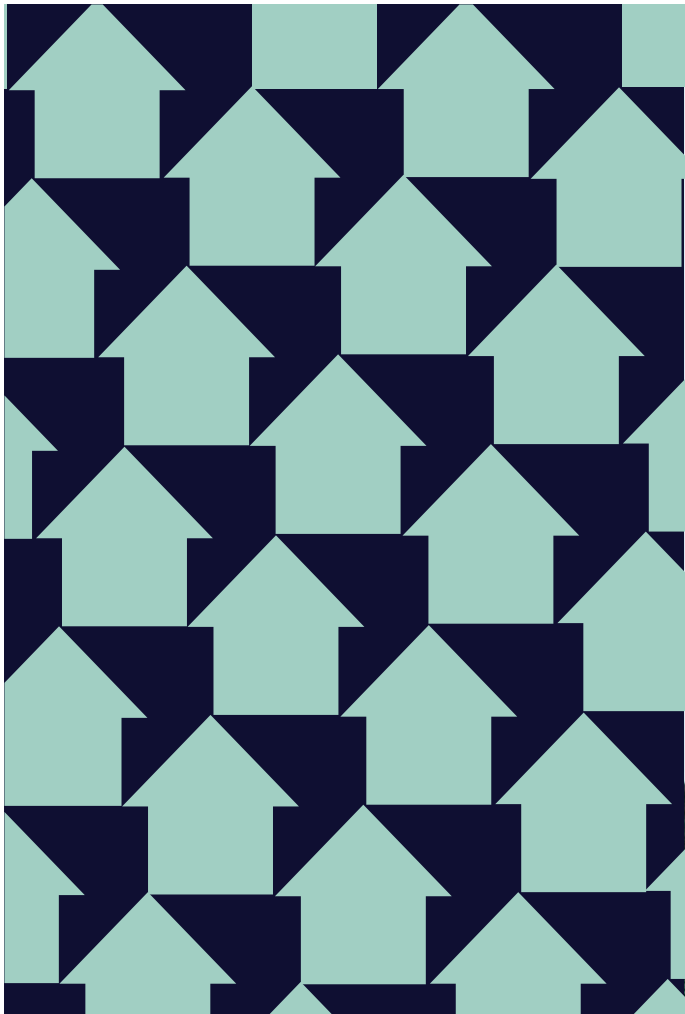
While we believe that individual actions to reduce emissions do make a difference, this action must be dramatically and radically scaled up to avert disaster in the time we have left.

Our commitment to a just transition ensures that we are developing and delivering solutions to benefit all sectors of society, including a focus on those who are suffering from fuel poverty.

We have a strong track record of:

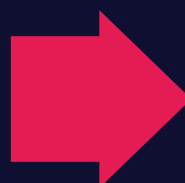
- ▶ Working in partnership with others
- ▶ Building trust and engagement with communities to inspire action
- ▶ Researching and piloting new services
- ▶ Scaling delivery to reach more people
- ▶ Openly sharing our knowledge and expertise
- ▶ Technical and practical experience in the development and delivery of home decarbonisation

Collaboration, empowerment, innovation, integrity and passion are the values which shape our behaviours and actions.



Bruce Wares
Marketing Manager
Home Energy Scotland
13 years at Changeworks

“Changeworks is large enough to make a real, lasting impact on thousands of people and the communities and organisations we work with across Scotland.”



[Read more about Bruce](#)

OUR PEOPLE

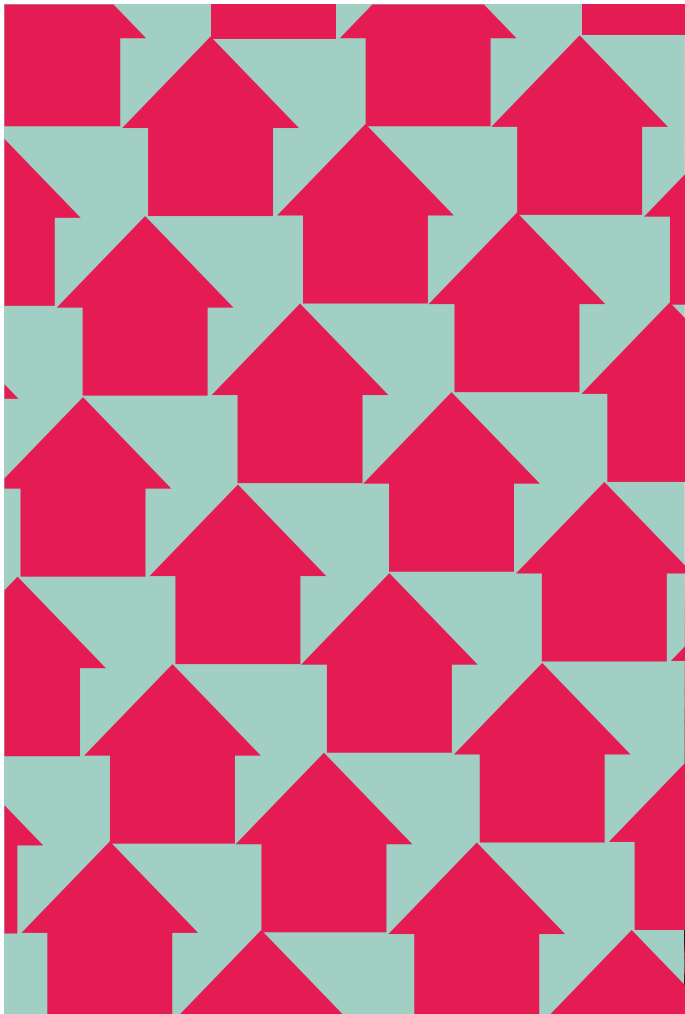
At Changeworks, we really value our talented and diverse people. That's why we do everything we can to be a supportive and positive environment that allows them to do their very best for the people we work with. We understand the importance of work-life balance and being flexible. Hybrid working is now the norm for the majority of our staff, with strong flexible working policies to allow you to work in the way that best suits you.

Staff wellbeing is a key priority for us, with a dedicated staff group promoting wellbeing and supporting staff across Changeworks and continually improving what we offer. The more supported and happy staff feel, the more successful we can be at achieving our mission. And in our annual staff satisfaction surveys, they tell us they feel it too – the latest survey found that nearly 86% of staff felt supported by the organisation, 89% agreed that they approve of the company culture, and 88% are proud to work for Changeworks.

We also provide good opportunities for progression and development, with a dedicated learning and development strategy to help you meet your personal goals – more on that later. Many of our staff stay at Changeworks for the long term, able to develop their careers and find new avenues for their passion and talents.

In 2021 we achieved Investors in People Platinum, the highest level of that accreditation. Only a handful of other employers in Scotland have this, and only 2% of IIP members worldwide.

Hear more about working with us from our team.



Cat Gear
Facilities Officer
5 years at Changeworks

**“ At Changeworks
you’re not a number
on the payroll, you’re
a real person and folk
are interested to get
to know you. ”**

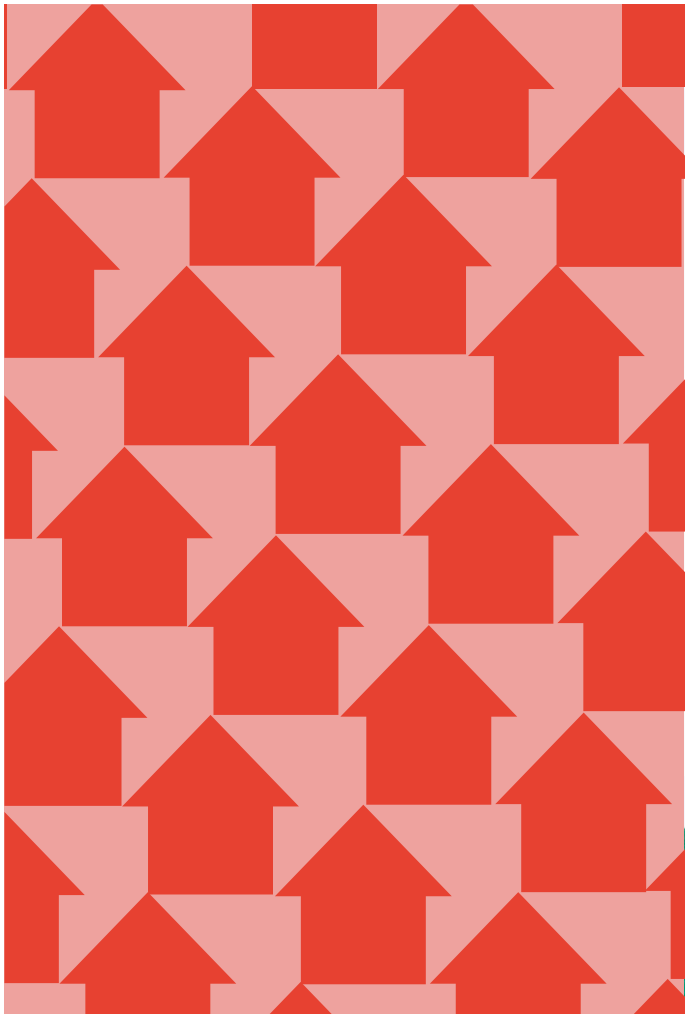


[Read more about Cat](#)

OUR BENEFITS

Working at Changeworks isn't just about culture, it's also about a great package of benefits and policies designed to support you in being the best that you can be. These policies allow you to be flexible and do your best at work, while supporting you to manage any challenges that might come along.

35 days leave per year (26 days plus 9 public holidays)	8% employer pension contribution	Volunteering days	Allowances for home office furniture
Driving licence support programme for staff who require this skill for their post	Employee counselling service	Eye care vouchers	Annual flu vaccinations
Travel season ticket loans	Paid leave for childcare emergencies	Death in service	Bike to work scheme that covers e-bikes too, up to the value of £3,000
Enhanced maternity, paternity and adoption leave pay	Shared parental leave	And even more policies to support your health and wellbeing	Find out more about why you should work for Changeworks



Joanna Long
Senior Impact Evaluation Consultant
2 years at Changeworks

“ The Bike to Work scheme meant I was able to get a folding bike, which has completely transformed my journeys to and from work. I love the flexibility and freedom it gives me, and I can’t imagine life without it! ”



[Read more about Joanna](#)

OUR IMPACT

When you join Changeworks, you're joining an organisation with a long track record of achieving big things.

Through our work with individuals, households, businesses and other organisations, we prevent hundreds of thousands of tonnes of carbon from damaging our fragile planet every year.

In 2020-21, our work meant a reduction of £2.2 million in people's heating and electricity bills, and over 3,000 measures installed in homes to improve energy efficiency.

That means helping people like Sheila Charters. A Borders resident, Sheila had her heating on for around 10 hours a day because she couldn't keep the heat in her home.

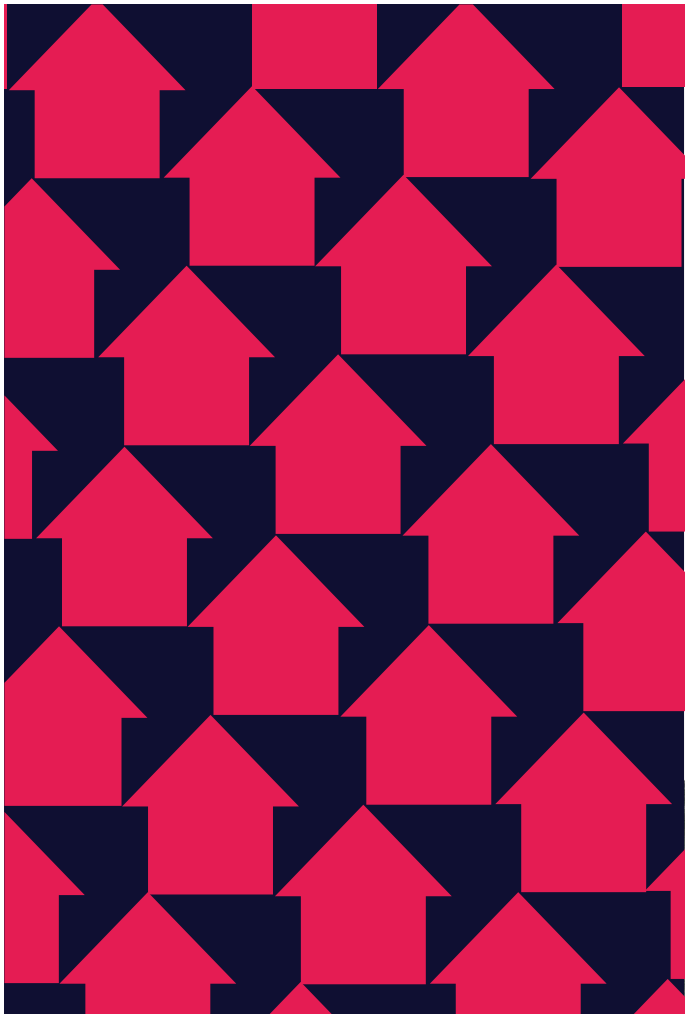
As part of delivering a Scottish Government scheme in the area, we were able to work with her to have external wall insulation installed. Not only did this refresh the outside of her home, it meant she only needed the heating on for an hour or so a day, reducing her bills and her emissions.

Our fuel poverty advice service also changes lives. Lives of people like Angus, who ended up with an estimated energy bill of over £1000. With us advocating to his supplier on his behalf and forcing an investigation, the bill was reduced to just £150.

We also worked with him to make sure he was on the best tariff and using his energy efficiently, all adding up to a saving of over £1200.

We remove over 200,000 tonnes of lifetime carbon every year.

Hear more about the difference we make.



Jay Scott
ICT Support Technician
6 years at Changeworks

“ Changeworks offers an excellent culture along with a great work-life balance. Each day I feel empowered to help my colleagues deliver excellent projects to benefit people across Scotland. ”



[Read more about Jay](#)

OUR GROWTH

Here's the best news: there's never been a better time to join Changeworks.

The climate emergency is the biggest threat to life as we know it. We need to scale up the action we're taking to avert disaster, and Changeworks is leading the way.

We have ambitious plans to grow as part of our new strategy launched in 2022. Last year we added more new staff than ever before and we aren't slowing down. Our services will continue to expand as we work to decarbonise hundreds of thousands of homes across Scotland.

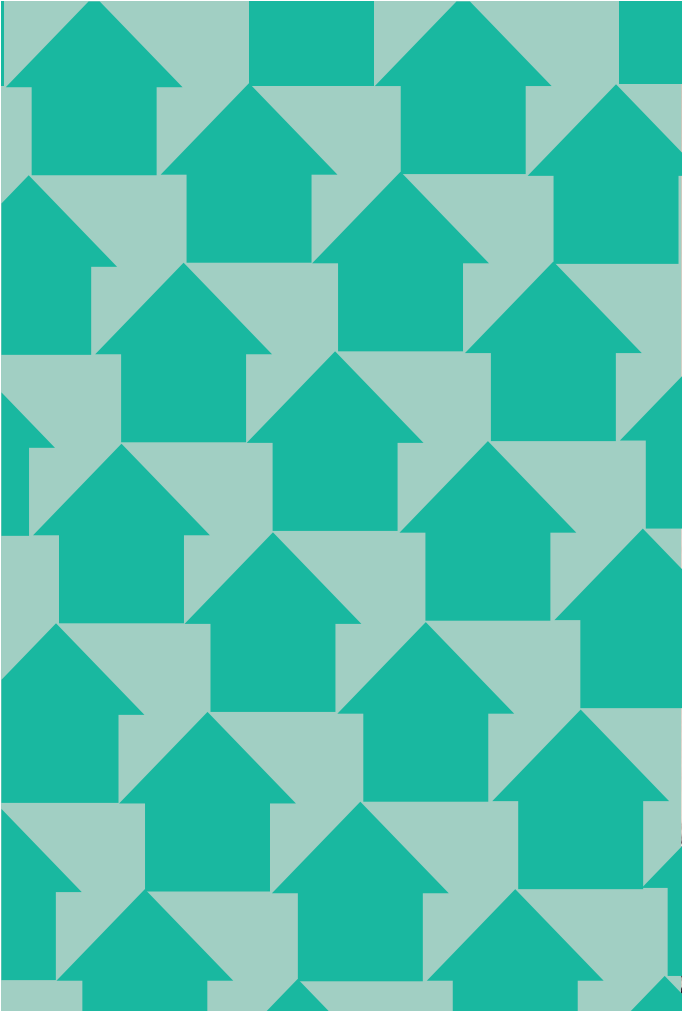
We want you to grow too. We believe passionately in learning and development for our staff, helping you to develop your skills and achieve your full potential. We invest heavily in learning and development, offering training wherever we can to upskill our people.

With partners like the Social Enterprise Academy we offer regular opportunities for training, and regular one-to-one meetings and annual appraisals offer regular chances to discuss your development.

Now more than ever, we need to expand our efforts to drive change and push towards Scotland's Net Zero targets. If you come and join us on that journey, we know it will be a rewarding one.

Our finances and staff numbers will almost double between now and the end of our new three-year strategy.

Hear more about the future of Changeworks.



Kehinde Moses
Senior Advisor Energy Care

1 year at Changeworks
& a previous volunteer

“Changeworks is a prestigious environmental charity... this gives me an opportunity to explore different areas to work and develop my career by working for a company helping to fight climate change.”



[Read more about Kehinde](#)

Changeworks

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INVESTORS IN PEOPLE™
We invest in people Platinum

Changeworks Resources for Life Ltd is a company limited by guarantee registered in Scotland No. SC103904 and a Scottish Charity SC015144