

Recruitment Pack

Job Title:	Finance Officer
Hours:	22.5 (3 days per week)
Term:	Permanent
Salary:	£28,000 - £32,000 (pro rata dependent upon qualifications / experience)
Reporting to:	Finance Manager
Closing Date:	Monday 17 August 2026 (9am)
Interviews:	Week commencing 24 August 2026

Introduction from Julie Robinson, Chief Executive

Thank you for taking the time to consider applying for a job at Citizens Advice South Warwickshire. As part of a national network of Citizens Advice offices, we work to make society fairer by helping our clients find a way forward whatever individual problems they may be facing. We do this through our core advice services available by telephone and email, and through all of our projects which are funded by a range of local funders. We also help to champion change at a local and national government level through our research and campaigning work.

The last few years have seen a massive change in how we deliver our vital services to the people in South Warwickshire. We have invested in our telephone Adviceline with our partners in BRANCAB and North Warwickshire, thanks to funding from Warwickshire County Council, and now take many calls directly from the public - over 1000 a month! This means we can often meet advice needs over the phone, freeing up vital face-to-face services at our drop-in services in Leamington Spa, Stratford District Council offices, and through our outreach locations. We have recruited more volunteers and can train and support them efficiently to deliver on the telephone and then face-to-face, which is a cornerstone of the Citizens Advice model. We are committed to ensuring our services are accessible and open to everyone who needs us. More and more people are facing hardship, whether that be through the current unprecedented cost of living crisis, unemployment issues, debt and benefit challenges, housing and food and fuel poverty.

Our services are now in more demand than ever.

Consequently, we are looking for people who are committed to thinking creatively about how we deliver our services now, and ways in which we can do things differently. We keep our clients at the centre of our work, and you would be joining a team of highly motivated and professional advice workers dedicated to making a tangible difference to the people in South Warwickshire.

About Citizens Advice South Warwickshire

We are an innovative community-based organization, focused on meeting the needs of the people we serve across the south Warwickshire area. This includes the larger towns of Warwick, Kenilworth, Leamington Spa, and Stratford Upon Avon, as well as the villages surrounding these towns. We have been able to demonstrate our excellence across our advice channels through the yearly inspection process from National Citizens Advice and our Advice Quality Standards across all advice areas (AQS).

Our People

Citizens Advice South Warwickshire has a Trustee Board of people who are all volunteers. Our Trustees bring a wide range of professional skills and knowledge and insight into the district to the planning of the service. The Trustees, in conjunction with the CEO, are ultimately responsible for setting the strategy and budget for the service. Day-to-day running and further development of the organisation is the responsibility of the CEO who, alongside the Operations Manager, Targeted Services Manager, Telephony Manager, Core Service Manager, and our Compliance Manager, oversee the delivery of our services.

CASW has 33 FTE paid staff members and is proud to have over 100 volunteers working in various roles, with more joining our training programs all the time. These roles include reception and administration, generalist advice, supervisors, money advice, research and campaigns work, financial capability, money mentors, IT support, and more. These volunteer roles have expanded in recent years and the service is actively developing volunteers to support its offer.

CASW operates from two main locations; Hamilton Terrace, Leamington Spa, and Stratford District Council offices (Elizabeth House), in Stratford-upon-Avon. The office in Leamington is used as our Advice Line Telephony Hub, and an admin, meeting, and training base currently and we are actively seeking community venues to deliver advice face-to-face to vulnerable clients. We also offer a unique home visiting service for those who would otherwise find access difficult. Anyone joining us can expect a flexible working base, with a degree of home working based on the needs of the business.

Our Clients

On many indices of deprivation, South Warwickshire can be defined as a low-need / high-income area. This masks significant pockets of deprivation, rural challenges of isolation, access to services and work, significant fuel poverty, and affordability, especially in relation to housing.

The difference we make

We make an amazing difference in the lives of the people of South Warwickshire. What we do is often life-changing and sometimes life-saving. In 2024-25 we delivered our advice and advocacy to 8,682 clients and advised on 39,361 issues.

Our funding and projects

We have a wide range of funding sources. This includes income from Warwickshire County Council, Warwick and Stratford District Councils, and a number of town and

parish councils. This income is awarded via direct grants and through commissioned contracts. We have also been very successful at drawing down further income from grant and project funding bodies including the Big Lottery Fund, Henry Smith Trust, Oken Trust, Orbit Housing, Money Advice Service, and many more.

Our local Research and Campaigns (R&C)

The stories our clients tell us provide us with a unique insight into the problems faced by people living in South Warwickshire. We are able to spot developing trends and this helps us to create campaigns and speak up for our clients to those in decision-making roles. By raising issues nationally we can create a public debate, change things for the better, and help many more people than those that contact us.

More on our projects and areas of work can be found on our website:

<https://www.casouthwarwickshire.org.uk>

The very best of luck with your application

Our Values:

Our Values are integral to how we work here in South Warwickshire, both in terms of our interactions with one another, and the work we do for clients. Launched in 2024, these Values were designed in collaboration with staff and volunteers and are regularly kept under review. Adherence to, and demonstration of, our Values will form part of your ongoing employment with Citizens Advice South Warwickshire.



General Terms & Conditions:

- 28 days annual leave. We close for the three days between Christmas and New Year. Annual leave allowance includes this.
- Statutory Sick Pay
- 3% Employer pension contributions
- Travel expenses are paid for staff delivering their roles at 45p per mile currently.

Additional Benefits

We also offer a range of additional benefits:

- Flexible working arrangements
- Life Insurance for all staff up to age 70
- Wellbeing services such as Employee Assistance, Medical and Legal Helpline for all staff
- Fees paid for membership in relevant professional bodies
- Regular professional development
- Occupational Health provision for all staff
- Free eye tests and a paid contribution towards lenses/spectacles for Computer users

Conditions regarding offers of employment

If you are successful in this process, you should be aware that we would offer the post **conditionally** in the first instance, whilst we follow up on your references, DBS (Disclosure and Barring Service) check (if appropriate), health clearance, and your right to work in the UK as detailed below:

Security Clearance

Any offer of employment will be subject to satisfactory completion of a security and pre-employment checks which for this role include DBS checks with Disclosure and Barring Service. The level of DBS check required for this post is: **Basic**. Further information about the security checking procedure is available on request.

Health Clearance

Any offer of employment will be subject to satisfactory completion of a Health Questionnaire, and should you disclose any health issues, then any offer of employment will be subject to a satisfactory assessment by Occupational Health. Occupational Health will identify whether any reasonable adjustments can be made to support you at work.

Right to work in the UK

Under United Kingdom immigration rules, it is a criminal offence to employ a person who is subject to immigration control and who has not been granted leave to enter or remain in the UK or does not have permission to remain in the UK.

Citizens Advice South Warwickshire therefore has a legal obligation to carry out document checks to ensure that you have a legal right to work in the UK. It is also a requirement that we retain copies of the relevant documents.

To avoid potential unlawful discrimination claims we will carry out appropriate checks on all candidates. For this role that will mean a **Basic DBS Check**.

How to Apply

We do not accept CVs. Please complete the Application Form (link below):

[CASW Application Form](#)

If you are unable to make an electronic application, you may request a paper copy and submit your application on paper and post to:

Recruitment

Citizens Advice South Warwickshire
10 Hamilton Terrace
Leamington Spa
CV32 4LY

If require reasonable adjustments or other assistance to apply please contact the recruitment team at:

recruitment@casouthwarwickshire.org.uk

Please ensure your application arrives before the deadline of 9am on Monday 17 August 2026

Interviews to be held the week commencing 24 August 2026 (If you are shortlisted you will need to be available this week)

Interviews will draw out the skills and competencies required for each role. As part of our recruitment process for this role, we may ask you to prepare a short presentation answering a specific question, which you will receive ahead of the interview date. We will use the presentation as part of the overall scoring for the recruitment process and consider the score an integral part of our decision-making.

Please note that when shortlisting we base our scoring and decision-making on the answers you provide in the personal statement section on the form. This section allows you to provide evidence of your experience, knowledge, skills, and abilities that are relevant to the role as described in the role profile. Selection is based on an assessment of the evidence you provide against the requirements of the role as set out in the person

specification. It is important that you tailor your response to clearly demonstrate how you meet each requirement. No assumptions will be made about your achievements and abilities. You should choose examples of past experience that clearly demonstrate what we are looking for, and be precise about what you did, how you did it, and the outcome or result of your actions.

A useful guide is the S.T.A.R. method:

- Specific – give a specific example
- Task – briefly describe the task/ objective/ problem
- Action – tell us what you did
- Results – describe what results were achieved

Please provide recent work examples wherever possible. However, do remember that relevant examples from other aspects of your life, for example: voluntary or unpaid work, school or college work, family or home responsibilities, can also be given.

Selection Process

After the closing date, we will consider all applications carefully and invite those candidates who appear, from the information available, to be the best-suited for the post to interview.

It's important therefore that your application gives a full but concise description of the nature, extent, and level of the responsibilities you have held. If selected, details of the interview process will be sent to you by email or letter.

Data Protection

We will use your application only to inform the selection process. Your application will be kept on record for 12 months after which we will destroy it. If you are successful, it will form the basis of your personnel record with us and we will store it in a manual file. We will hold any data about you in completely secure conditions with restricted access.

We will include data that you provide on the diversity monitoring form in a general database for statistical monitoring purposes only enabling us to monitor the effectiveness of our policy on Equal Opportunities and Employment. Individuals will not be identified by name.

We shall consider that by submitting the enclosed forms you are giving your consent to the processing of your data in the ways described above.

Religious Divergence

We respect the diversity of our employees and that they come from a variety of religious backgrounds. Our policy is to respect all religious faiths and we will, where reasonably practical, be supportive when staff want to follow their regular practices connected with their religion.

Equality and Diversity

We recognise the benefits of having a diverse workforce and will take steps to ensure this. If you would like to see our Equality and Diversity policy, please let us know and we will provide you with a copy.

Disability Confident Committed Employer

We are proud to be a Disability Confident Committed employer, dedicated to fostering an inclusive and accessible workplace. We provide equal opportunities for all applicants and employees, offering reasonable adjustments throughout the recruitment process and ensuring that disability is never a barrier to opportunity. As part of this commitment, we offer a guaranteed interview scheme to any applicant with a disability who meets the minimum essential criteria for the role.

Job Description & Person Specification

Finance Officer

Hours per week: x1 Part time post - 22.5 hours (3 days per week)

Contract: Permanent

Salary: £28-32k (FTE) dependent upon qualifications / experience

Responsible to: Finance Manager

Responsible for: No line management responsibilities

Location: Leamington Spa Office base (with possibility of a day a week at home once fully established in the role)

Overall Purpose of the Role

This is an opportunity to join a progressive charity finance team where you'll be able to do more than just process transactions. You'll play a key role in keeping our organisation financially strong while helping modernise our finance systems through automation, AI and smarter ways of working. Your work will directly support the delivery of advice services that change thousands of lives across South Warwickshire every year.

The Finance Officer is responsible for day to day financial activities including banking, cash management, staff and volunteer expenses, payroll calculations, timely and accurate updating of the Quickbooks finance package, invoicing and reconciliations and acts as a key support to the Finance Manager and Treasurer. The role also covers a variety of regular returns, and works to ensure that payments to clients from hardship and other funds are managed effectively.

Whilst keeping on top of the necessary "business as usual" the successful applicant will also play an important role in supporting the financial stability and ongoing development of the organisation. In particular we are looking for a candidate with excellent IT skills who can help drive forward the automation of systems and processes and ensure we are making the best use of new AI technologies.

This is a varied and responsible role requiring excellent organisational skills, strong attention to detail and the ability to manage confidential financial information appropriately.

Responsibilities:

- Monthly payroll processing and review including checking SMP & SSP, apportionment of salaries across projects and payments to HMRC / The People's Pension
- Actively contribute to improving Finance processes (looking to automate / utilise AI tools where practicable and cost efficient to do so)
- Cashflow management, bank and petty cash reconciliations
- Financial record keeping / booking entries into Quickbooks
- Supplier and expense payments by BACS / online banking
- Project budgeting, reporting and performance monitoring
- Support with statutory audits and CitA National reporting
- Hardship grant fund administration and reconciliations (including making client hardship payments, ensuring funds are accurately reported within the financial records)
- Provide first-line finance and administrative support across the organisation
- Management of staff holiday booking system
- Sundry reporting and returns (100 Club, staff mobile phones, Gift Aid)

Professional development:

- Keep up to date with policies and procedures, changes to relevant legislation and practices, through relevant reading and training.
- Attend regular meetings with line manager.

Other duties and responsibilities:

- Uphold the Values, Aims and Principles of Citizens Advice South Warwickshire (CASW) and its equal opportunities policies.
- Abide by health and safety guidelines and share responsibility for your own safety and that of colleagues.
- Carry out other tasks which may be within the scope of the role to ensure the effective delivery and development of the service.

This job description is not exhaustive or exclusive. It is intended as an outline of the areas of activity and will be amended in light of the changing needs of the organisation and the funding we have in place to deliver the service.

PERSON SPECIFICATION

	CRITERIA	ESSENTIAL / DESIRABLE
1	A bookkeeping or accounting qualification (such as AAT, IAB or equivalent) or qualified by experience with a strong bookkeeping or finance background.	Essential
2	Recent practical experience of UK payroll administration, including calculation of SSP/OSP/unpaid leave etc	Essential
3	Strong experience of spreadsheets (Excel, Googlesheets) and financial accounting packages (CASW uses Quickbooks).	Essential
4	Ability to analyse and communicate complex information effectively.	Essential
5	Self-motivated and disciplined with the ability to work independently, meet deadlines and manage time / workload effectively.	Essential
6	Ability to work with minimum supervision.	Essential
7	Highly organised with excellent accuracy, attention to detail and record-keeping.	Essential
8	Good interpersonal skills and confidence in communicating with colleagues and external organisations both verbally and in writing.	Essential
9	Comfortable working with financial information, adhering to confidentiality and data protection principles.	Essential
10	Ability to commit to and work within the aims, principles, values and policies of CASW.	Essential
11	Keen interest in using AI tools (such as ChatGPT or Claude) and technology to improve finance processes	Desirable

12	Experience of working within a charity finance environment.	Desirable
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