

Job Description

Head of Finance

Disgrifiad Swydd

Pennaeth Cyllid

Croeso!

Ni yw Sefydliad Cymunedol Cymru ac rydym ni yma i ysbrydoli pobl i roi, yn helpu cymunedau Cymru i ffynnu ac yn newid bywydau gyda'n gilydd.

Mae'r sefydliad wedi rhannu mwy na £30m i bobl a grwpiau cymunedol ar hyd Cymru ers ei sefydlu - dipyn o lwyddiant!

Nawr rydan ni yn edrych am Bennaeth Cyllid talentog i ymuno â'r tîm - ac i'n helpu i dyfu'n bellach er mwyn cefnogi mwy o bobl ar hyd a lled Cymru.

Mae'r sefydliad wedi tyfu dros yr 20 mlynedd diwethaf ac mae cynlluniau mawr i ddatblygu yn bellach, drwy annog mwy o roi dyngarol er mwyn cryfhau'r gefnogaeth allwn ni gynnig i elusennau a grwpiau lleol.

O ran cyllid, llynedd yn ystod y pandemig bu i ni allu darparu £5.5m o grantiau, gan gefnogi dros 1,000 o grwpiau ac unigolion. Mae'r sefydliad yn derbyn incwm o fuddsoddi ein cronfa waddol a drwy ddarparu gwasanaethau rhaglenni grantiau ar hyd Cymru. Mae'r Sefydliad yn rheoli asedau elusennol o dros £21m.

Mae'n amser gwych i ymuno â ni. Mae'r tîm wedi bod yn gweithio yn hyblyg ers dechrau'r pandemig gan lwyddo i i gyflawni y ffigwr uchaf o grantiau yn hanes y Sefydliad. Yn y misoedd diwethaf rydan ni wedi agor nifer o gronfeydd elusennol newydd, a gyda mwy eto ar y ffordd.

Mae'r dyfodol yn argoeli yn dda gydag arolygon yn dangos twf mewn rhoi dyngarol yn gyffredinol.

Bydd y rôl yma yn berffaith i rywun gyda phrofiad o weithio yn y maes cyllid ac sydd eisiau swydd sydd yn gwneud gwahaniaeth i bobl Cymru. Mae'n gyfle gwych i rywun sydd eisiau hyblygrwydd o ran gwaith a bywyd ac sydd ei hunain hefyd yn gallu bod yn hyblyg.

Mae gennym ni ffocws cryf ar y tîm a datblygu sgiliau personol a gwaith. Mae digon o gyfle i ddysgu, cyfarfod â phobl ddiddorol a gweithio'n agos gydag aelodau ein bwrdd ymddiriedolaethol.

Drwy'r pecyn yma dwi'n gobeithio y byddwch chi yn mwynhau dysgu am y sefydliad a'r gwaith pwysig sydd yn digwydd yma ac yn teimlo fod ganddoch y sgiliau a phrofiad i helpu ein datblygiad.

Os am sgwrs am y swydd, croeso i chi gysylltu â mi richard@communityfoundationwales.org.uk - ac mi drefnwn amser i siarad â chyfle i rannu mwy o'n stori llwyddiant.

Dwi yn edrych ymlaen at glywed ganddoch.

Richard Williams
Prif Weithredwr, Sefydliad Cymunedol Cymru

Welcome!

We are Community Foundation Wales and we're here to inspire people to give, help Welsh communities to thrive and change lives together.

The foundation has given more than £30m to people and community groups across Wales since it was formed – quite a success story.

Now we are looking for a talented Head of Finance to join our fantastic team – and to help us continue to grow so we can change more lives across Wales.

We have grown over the past 20 years and now have big plans for further development, by encouraging more philanthropy and giving in Wales, so that we can strengthen further the support we give local communities and charities.

In terms of finance, last year during the pandemic we were able to provide £5.5m in grants, through more than 1,000 groups and individuals. The foundation receives income from its endowment fund, and also by providing grant programme services across Wales. The foundation manage charitable assets of £21m.

This is the perfect time to join us. During the pandemic our team have been working flexibly through what has been a record grant-making year for the foundation. We intend to continue with this successful flexible working approach.

And the future looks bright. Recent research shows projections for strong growth in donor-advised giving and philanthropy.

This post is the perfect fit for someone with experience of financial management and who wants to make a difference for people in Wales. It's a great opportunity for someone seeking flexibility through work-life balance and who can themselves be flexible.

We have a strong focus on our team and development of personal and work skills. There are plenty of opportunities to learn, and to meet interesting people doing some great things across Wales, as well as working closely with our board members.

Through this pack, I hope you enjoy learning a little about the foundation and the important work that happens here and that you feel we are the kind of organisation you would like to be a part of and to help drive our future growth.

If you'd find it useful to have a chat about the role please get in touch - richard@communityfoundationwales.org.uk - and I will be happy to fix up time to talk and share more of our great story with you.

I look forward to hearing from you.

Richard Williams
Chief Executive, Community Foundation Wales

Amdanom ni:

Rydym yn ysbrydoli pobl i roi, helpu cymunedau yng Nghymru i ffynnu a newid bywydau gyda'n gilydd.

Drwy weithio gyda'n cefnogwyr a'n partneriaid hael, rydym yn dod o hyd i brosiectau lleol sy'n helpu i atgyfnerthu cymunedau ar hyd a lled Cymru a'u hariannu.

Mae Sefydliad Cymunedol Cymru, a sefydlwyd yn 1999, bellach yn dyfarnu grantiau gwerth dros £2 miliwn y flwyddyn i elusennau a grwpiau cymunedol.

Mae dros 30,000 o grwpiau cymunedol ac elusennau yng Nghymru sy'n gweithio i wella a datblygu eu cymunedau gan ddefnyddio eu menter eu hunain i ddiwallu anghenion lleol. Mae'r grwpiau a'r elusennau hyn yn deall yr heriau y mae'r bobl yn eu cymunedau yn eu hwynebu ac yn gwybod pa un yw'r ffordd orau o fynd i'r afael â'r rhwystrau hyn.

Gwneir y gwaith hollbwysig hwn fel arfer o fewn cyllideb gyfyngedig neu yn wirfoddol, felly rydym yn canolbwyntio ar ddod o hyd i'r prosiectau a'r sefydliadau gwych hyn, deall beth y maent yn ceisio ei gyflawni a'u cefnogi i wneud hynny.

About us:

We inspire people to give, help Welsh communities to thrive and change lives together.

Working with our generous supporters and partners, we find and fund local projects that help strengthen communities across Wales.

Established in 1999, Community Foundation Wales now awards grants of over £2million each year to charities and community groups.

There are over 30,000 community groups and charities in Wales working to improve and develop their communities, using their initiative to meet local needs. These groups and charities understand the challenges faced by people in their community and know how best to tackle these barriers.

This vital work is often carried out on a shoestring budget or voluntary basis so we focus on finding these fantastic projects and organisations, understanding what they are trying to accomplish and supporting them to do so.

What our team say about working at Community Foundation Wales:



"It's my home away from home, my work family. Feeling comfortable and valued is important to me. CFW is that place, a place where I can feel comfortable but also challenged, a place where my opinion counts and a place where I'm encouraged to put my best skills to the test whilst developing new and improved techniques. A place where my colleagues are also my friends."

"The working environment at the foundation is warm, friendly, relaxed and supportive. Everyone is keen to help each other out and to work harmoniously as a team. I find the working policies to be very flexible, which is helpful to me in my position as a part-time."

"CFW is a great place to work with a relaxed atmosphere and strong team ethos. Everyone is encouraged to give opinions and share thoughts and not just on their own area of work. There is a shared passion amongst the team for helping communities and making a real difference to the people of Wales."

"It's rewarding to work as a member of the team and know the work you are doing is helping others. It's a nice environment to work in and our office is based in the city centre, which is ideal! It's a busy office but the small team means that it's usually quiet, which makes it easier to concentrate and get on with your work. Community Foundation Wales are usually quite flexible with taking leave. The week off at Christmas is also a great perk of the job."

"Teamwork is key at the Foundation and we all help each other. Everyone gets on well and I'm glad I get to work with such knowledgeable, hard-working and friendly colleagues. The office is busy and can be noisy at times. The Foundation has invested in my development by encouraging me to go on courses and by giving me opportunities in the workplace which has been great for my development. I feel valued and enjoy coming to work every day."

Job Description

Post: **Head of Finance**

Hours: 37.5 hours per week (We are happy to consider reduced working hours and/or flexible working patterns)

Salary: £36-£40,000 FTE

Responsible to: Chief Executive

Responsible for: Finance Administration Assistant

Job Purpose: This is a unique role that helps strengthen communities across Wales. Last year Community Foundation Wales fund distributed £5.5m to local charities who change lives in local communities. We have ambitious growth plans and this role is integral to our success.

This role ensures efficient management of Community Foundation Wales' finances, providing financial support for the staff team and Board of Trustees, as well as our donors and funders.

Benefits: 25 days holiday per annum pro rata, in addition to public holidays, plus an additional three days of holidays over the Christmas period.

5% contributory pension.

Employee Assistance Programme, Cycle to Work scheme, subsidised gym membership in Cardiff and weekly mindfulness and yoga sessions.

Location: Our office is just off Queen Street in Cardiff, five minutes from the shopping centre and Queen Street Station. We have an Agile Working Policy and would be happy to see a balance of working in the office and remotely, according to the needs of the role.

Main Tasks and Responsibilities

1. Finance

- Responsible for developing, implementing and managing financial systems to provide accurate financial records and control systems.

- Responsibility for all banking procedures, including liaison with banks, building societies and cheque signatories.
- Account for all financial transactions and prepare monthly accounts and bank reconciliations using SAGE.
- Prepare and presenting quarterly management accounts to the Chief Executive, Treasurer and Board of Trustees.
- Prepare Annual Budget and three year forecasts in consultation with the Chief Executive and Treasurer.
- To provide any other financial reports as required for the Chief Executive, Treasurer, Board of Trustees, Funders, Donors or Community Foundation Wales committees.

2. Grants

- Overseeing the processes to ensure that there is accurate recording of grant income and payments.
- To provide reports and analysis as and when required for individual funds.
- To prepare returns and claims to Funders as required.

3. Investments

- Responsible for the accurate recording of all investment income and payments to enable reporting and control of investments.
- To provide reports and analysis as and when required for donor funds.
- To liaise with external Investment Managers to provide reports and analysis as when required for the Finance, Risk and Investment Committee and Board of Trustees.

4. End of year accounts

- Responsible for production of annual accounts in accordance with current legislation and best accounting practice. Liaison with auditors and assistance with annual audit.
- To ensure the completion of the annual reports and returns to the Charity Commission and Companies House, along with Gift Aid and VAT claims.

5. Governance

- Responsible for ensuring the Finance Risk and Investment Committee is effectively supported to deliver their terms of reference and remit, including: the production of timely reports, following up on actions and ensuring compliance with Charity Commission and other reporting requirements.

6. Management

- Line management of the Finance Administration Assistant.
- Work as a member of the foundation's Senior Management Team, ensuring that collectively we deliver on the business plan agreed by trustees.

7. Other

- To attend training courses and events as required and in particular ensuring that the post-holder is kept up to date with specialist technical requirements – e.g. changes to SORP.
- To undertake other tasks and projects as required in line with the scale and general nature of the post.

The person we are looking for:

Values

Community Foundation Wales is a values-based organisation. Our values were shaped by our staff team and trustees and underpin our everyday work.

- We are good partners
- We care about the people we work with
- We make a difference

We are looking for a manager who will thrive in this values-based environment.

Essential

- Has a recognised financial qualification
- Experience of working in a small team
- Has a methodical approach
- Excellent knowledge of Sage or similar accounting software
- Knowledge and experience of Salesforce or a similar database
- Excellent written and verbal communication skills
- An ability to understand, develop and follow policy and procedures
- IT literate with a strong working knowledge of Microsoft Excel
- Ability to analyse and evaluate information and write reports
- Excellent organisational skills and working to tight deadlines
- Energetic and enthusiastic, good team-worker

- Customer-services focussed approach and friendly, helpful manner
- Ability to relate to people from all sectors
- Willingness to learn, explore and train

Desirable

- The ability to speak Welsh
- Knowledge of the voluntary sector in Wales and the charities' SORP
- Experience of successful relationship and client management

Ready to apply?

To apply, please complete the application form and send to info@communityfoundationwales.org.uk.

Closing date for applications is 5pm, October 20, 2021.

Timeline:

October 6	Recruitment campaign opens
October 20	Close of campaign
October 21	Shortlisting
October 22	Shortlisted candidates are notified
October 27	Interviews are held at our Cardiff office or by video, if needed depending on Covid restrictions

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