



Finance & Operations Manager

Candidate Pack

February 2024



Welcome

Thank you for your interest in our Finance & Operations Manager role.

SOS is a small charity with a big ambition: to help secure a thriving and resilient future for critically endangered Sumatran and Tapanuli orangutans, as well as the people living alongside them.

With an admirable portfolio of projects and partnerships built up over 22 years of supporting conservation efforts in Sumatra, we have recently launched our ambitious Conservation Greenprint, our strategy to 2030, which has collaboration with forest-edge communities at its heart.

SOS is part of a network of conservation optimists, and I am in the fortunate position of having my optimism bolstered on a daily basis by the great strides that our partners and allies in Sumatra are making.

Of course, we need more than optimism to achieve real results, but we also have a plan, and all the ingredients to turn that plan into a conservation success story for orangutans, forests and communities. We are partnering with fantastic, effective frontline organisations doing some truly impactful work; there are tried and tested programmes that are ready to be scaled up; there are innovative approaches that are ready for investment.

To help us succeed in this exciting new phase, we are looking for an exceptional Finance & Operations Manager to join our team and help us to realise our ambitious plans. Just as our conservation strategy supports wild orangutans to thrive in resilient forests, this new role will **underpin the charity's resilience and enable us to thrive.**

You'll be joining a fast-paced, dynamic team and we will do everything we can to help you succeed. You will work closely with the Chief Executive, Programmes and Fundraising teams, to ensure the charity operates smoothly through a period of significant growth.

This role offers some unique rewards – this is a real chance to play a vital role in the protection of an iconic species and their precious rainforest habitats.

If that's the sort of challenge that excites and energises you, we can't wait to hear from you.

Come and join an innovative, agile and dedicated conservation charity, as we ramp up our efforts to realise a flourishing future for orangutans, forests and people.

Helen Buckland
CEO

Job Description

Job Title:	Finance & Operations Manager
Salary:	£36k - £38k (pro rata) depending on experience
Terms:	Part-time: 15 hours/week (0.4 FTE); Initially a 12 month fixed-term contract, with the strong possibility of becoming a permanent role.
Working pattern:	Flexible
Reporting to:	CEO
Base:	Flexible - Remote, or at the SOS office in Abingdon, near Oxford.
Benefits:	25 days annual leave + public holidays (pro rata) with additional paid leave over the Christmas period, 5% pension contribution and continuous professional development.

Job Purpose

The Finance & Operations Manager will be responsible for the overall financial management and operational effectiveness of the charity. Working closely with the senior leadership team, the successful candidate will play a key role in shaping the financial strategy, managing budgets, and implementing robust financial controls. In addition, the role encompasses overseeing day-to-day operations to ensure the smooth running of the charity, with a focus on maximising impact and sustainability.

Role Summary

In Autumn 2022, SOS launched our Conservation Greenprint, our strategic vision to 2030. Our mission is to support forest-edge communities, local authorities, and our network of frontline partners in safeguarding the Sumatran rainforest. The goal is to ensure the future of critically endangered Sumatran and Tapanuli orangutans and contribute to the fight against the global climate crisis.

Experiencing significant growth in recent years in line with our ambitious strategy, SOS has created the Finance & Operations Manager role to address the growing need for robust financial and operational systems. This role is pivotal in supporting strategic planning, empowering informed decision-making, enhancing operational efficiency, and attracting the funding required to scale up our impactful work. This is a new role, bringing together responsibilities which are currently either outsourced or performed by different members of staff.

Over the next five years, we aim to make a significant step-change in our operations and the impact of our programmes in Sumatra. The Finance & Operations Manager will play a crucial role in sustaining the charity's success and growth.

Detailed Responsibilities

The Finance and Operations Manager will undertake a broad range of tasks. Key responsibilities include:

1. Financial Management	
Financial Systems and Processes	Establish, document, streamline and implement financial policies and procedures that align with best practise and the needs of the organisation.
	Adhere to and promote financial controls and best practices within the organisation.
Budget Management	Manage the budgeting process for the annual plan in collaboration with the Senior Leadership Team.
	Collaborate with staff members on individual programme and project budgets and ensure they align with the overall budget.
	Support the Programme team in the allocation and monitoring of programme budgets.
	Support the Fundraising team to prepare budgets for funding applications.
	Support the integration of full cost recovery into programme budgets.
Financial forecasts	Conduct and maintain cashflow and longer-term financial forecasts in line with the charity's Development Strategy, with the support of the Chief Executive and Development Director.
Reserves	Support the calculation of target reserves, and ensure compliance with the reserves policy.

2. Financial Administration	
Bank reconciliation	Perform regular bank reconciliations, ensuring all income and expenditure transactions are recorded and ledgers kept up to date on the accounting system (Quickbooks).
Record maintenance	Maintain accurate records of all financial transactions.
Financial operations	Manage all day-to-day financial operations, including expense claims, payments, invoices, and VAT administration.
Data management	Accurate entry/import of all donation and donor data into our CRM database.
	Manage financial administration for grant or donor funded projects and ensure reporting and audit requirements are met.
Gift Aid administration	Timely and accurate preparation and submission of gift aid claims.
Banking	Setting up payments in online banking for authorisation/payment.
	Support overseas grant payments to delivery partners in Indonesia.
Payroll	Liaising with the payroll agency to oversee payroll and pensions.

3. Financial Reporting

Liaison	Maintain and manage relationships with our external accountants, and ensure all financial records and documentation are readily available for external examination purposes.
Management accounts	Prepare monthly financial reports and management accounts, including variance reporting on income and expenditure, cashflow and reforecasting.
Annual Returns	Submission of returns to the Charity Commission.
Reporting to the Board	Deliver financial reports for quarterly trustee meetings and the Finance & Resources Committee, providing insights and advice to support decision-making.
Donor reporting	Provide financial updates and reports to funders as required

4. HR

Salary reviews	Incorporate salary recommendations into the Budget, and in line with the charity's pay review policy .
HR administration	Administer all aspects of staff employment contracts, pension notices, and annual leave allocations.
	Manage processes for staff starters and leavers, including liaising with our payroll agency and entry on our HR portal (Breathe HR).
	Coordinate the full employee life cycle including the administration of recruitment, onboarding, performance management and exit interviews.
	Ensure that employee records are accurate, up-to-date, and managed within the requirements of the Data Protection Act.
Day-to-day HR processes	Manage day-to-day HR processes and administration, including acting as first point of contact for staff making general HR or policy enquiries.

5. Operations

Policies	Responsible for ensuring organisational and HR policies and the Staff Handbook are up to date and continually improved to align with or exceed sector best practise.
Contracts & suppliers	Administer all contracts and renewals (e.g. insurance, office contracts, business rates and software licences).
Communications	Supervise answering machine and deal promptly with messages.
	Help to organise regular in-person team meetings.
IT	Arrange set-up of new staff on computers and e-mail addresses (Google Workspace).
	Report to the CEO on any IT issues, including necessary upgrades, to ensure our IT is fit for purpose.

Database Management (We use CiviCRM – experience with this CRM is not a prerequisite, training will be provided.)	Support management of the database to deliver up-to-date accurate information, including but not limited to: <ul style="list-style-type: none">• Data retrieval and generation of regular reports,• Accurate data input,• Liaise with our external CRM developer to receive support regarding fixes where we cannot perform them internally
Data Protection	Ensure data is protected/ managed appropriately in compliance with the UK Data Protection Act 2018, and champion this within the team.



About You

We are seeking an individual with the expertise, motivation, and aptitude to develop and execute financial and operational systems that will support and enhance the charity's impact, facilitate its growth, and ensure long-term sustainability.

This role will suit an experienced and motivated finance professional keen to join a small but highly effective team, and willing to take on responsibility quickly. You thrive with autonomy but you are also a team player and naturally keen to champion team success, as well as your own.

Essential Requirements:

- Proven experience of managing a finance function, ideally within the charitable sector.
- A formal qualification in finance, accounting, business administration or a related field, or **demonstrably 'qualified by experience' (minimum 3 years)**.
- Strong experience of financial planning, budget preparation and management, and reporting.
- Experience of working with an online accounting software package such as Quickbooks (if experience is in a different package training can be given).
- Experience of CRM management, including data import and reporting (training will be provided on our CRM system)
- Demonstrated ability to develop and implement effective operational processes.
- Proficiency in relevant software and financial management tools and systems.
- Excellent communication skills, able to interpret financial information and confidently and effectively communicate it to individuals without a financial background.
- Great interpersonal skills, with the ability to build good working relationships across a remote team, working collaboratively to achieve common goals.

Key attributes:

- Organised and efficient, with high accuracy and exceptional attention to detail.
- Strong problem-solving and decision-making skills
- Positive, pro-active and pragmatic
- Collegiate, supportive and collaborative
- Self-motivated and self-disciplined, able to manage and prioritise own workload and deliver to deadlines using initiative with minimal supervision
- A personal **interest in SOS's** mission

Why work with us

Mission

We are on a mission to enable wild orangutans to thrive in resilient forests. We operate at the frontline of some of the world's most pressing environmental and social challenges, implementing effective and scalable responses with communities at their heart.

Culture

We're a small and nimble organisation, quick to embrace new opportunities and implement promising ideas. We expect and support our staff to take a lead in their own work, offering scope for creativity and strategic input.

Professional development

We challenge and support our team to grow their skills, providing exposure to different work experiences and training opportunities.

Unity

Our small team and board of engaged trustees work closely and collaboratively together, sharing ideas, celebrating successes and breaking barriers to accelerate our impact.

Equality, Diversity, and Inclusion

At SOS we are committed to Equality, Diversity, and Inclusion as core to our operations, and our commitment is alive as we seek to grow our team to enable us to meet our ambitious Conservation Greenprint strategy. We welcome applications from any person who is interested in this role and has the skills, ambition and energy to make it happen.

Equality: We make sure that everyone is treated fairly and with dignity and respect. We challenge discrimination and remove barriers, so that everyone has opportunities to achieve their desired outcomes.

Diversity: We recognise the benefits of different values, abilities, and perspectives, and celebrate **people's differences. We promote an environment that welcomes and values diverse backgrounds, thinking, skills and experience.**

Inclusion: We operate a working culture where everyone has equal access to opportunities and resources, and where everyone feels valued and accepted. At SOS we welcome everyone to contribute and have a voice and we make reasonable adjustments to facilitate active participation.

How to Apply

Please send your up-to-date CV which demonstrates how you fit the person specification and a short covering letter of no more than two pages, telling us what you will bring to this role and why you want to work for SOS.

If you would like to arrange an informal chat about this role, please contact Helen Buckland, CEO at helen@orangutans-sos.org

Email applications to: recruitment@orangutans-sos.org

Closing Date: 9am, Monday 18th March 2024

First interviews: Monday 25th March 2024

