

Financial Services Manager

Team - Finance	Direct team responsibility – 6
Manager – Assistant Director, Finance	Budget responsibility - £1.5m
Location – Northallerton/Hybrid	Job grade - 6

Role purpose:

The Financial Services Manager is responsible for leading the organisation's financial operations, procurement and insurance activities. The role ensures the efficient delivery of financial services, maintains strong financial controls and provides assurance that all financial transactions, systems and reporting requirements are accurate, compliant and effective.

The role oversees Accounts Payable, Cashbook and Banking, Payroll, Finance Systems, Insurance and Procurement functions, ensuring strong financial controls, excellent customer service and continuous improvement. The post holder will safeguard the organisation's housing portfolio and work across the business to ensure contracting managers follow procurement best practice and achieve Value for Money.

The Financial Services Manager will lead the Financial Services team, ensuring the organisation maintains a strong control environment and delivers efficient, customer-focused financial services.

Organisational Structure





Main responsibilities:

Finance operations – cashbook and accounts payable

- Lead the management of all cashbook and banking activities.
- Ensure all receipts and payments are accurately recorded and reconciled.
- Maintain banking mandates and authorised signatory arrangements.
- Ensure banking processes comply with organisational policies and financial regulations.
- Develop controls to safeguard organisational funds and minimise financial risk.
- Lead and manage the Accounts Payable function, ensuring invoices are processed accurately and efficiently.
- Ensure supplier payments are made in accordance with agreed payment terms.
- Maintain appropriate controls over creditor transactions and payment processes.
- Monitor creditor balances and investigate outstanding items.
- Oversee supplier account reconciliations and resolution of queries.
- Ensure segregation of duties and financial controls are maintained across all payment processes.

What does success look like?

Cashbook and banking activities are accurate, timely and fully reconciled. Financial risks are minimised through strong controls, cash balances are clearly understood, and management have confidence in the integrity of banking and cash information.

Accounts Payable operates as an efficient and trusted service. Suppliers are paid accurately and on time, financial controls are robust, queries are resolved promptly and the organisation benefits from efficient processes that support strong supplier relationships and value for money.

Payroll & Pension

- Lead the delivery of an accurate and efficient payroll service.
- Oversee payroll processing and validation activities.
- Ensure compliance with HMRC requirements and statutory payroll regulations.
- Manage payroll reconciliations and accounting entries.
- Coordinate pension administration and reporting requirements.
- Work collaboratively with the People Team to support delivery of payroll service and the organisation's pension strategy, ensuring both payroll and pension arrangements are effectively administered, communicated and aligned with workforce planning and colleague engagement priorities.
- Monitor developments in payroll legislation and implement required changes.

What does success look like?

Payroll is delivered accurately and consistently, colleagues have confidence in the service they receive, statutory obligations are met and strong controls ensure compliance with all legislative and regulatory requirements. The People Team and Finance work together effectively to deliver the pension strategy, with clear administration, timely reporting and well-communicated pension arrangements that support organisational objectives and colleagues understanding.

Finance systems

- Lead the management and development of the organisation's finance systems.
- Ensure finance systems remain secure, effective and aligned to business requirements.
- Act as system owner for core finance applications.
- Manage system upgrades, testing and implementation activities.
- Ensure finance systems integrate effectively with other corporate systems.
- Develop and maintain system controls, workflows and user permissions.
- Produce and maintain system documentation, procedures and guidance.
- Lead the identification and implementation of automation opportunities.

What does success look like?

Finance systems are reliable, user-friendly and effectively support organisational objectives. Users receive excellent support, processes are streamlined through automation, and technology enables efficient and accurate financial operations.

Insurance

- Lead the management of the organisation's insurance programme.
- Maintain appropriate insurance cover across all operational activities.
- Work closely with brokers and external advisers to review insurance requirements.
- Coordinate annual insurance renewals and procurement exercises.
- Manage insurance claims and ensure claims are progressed effectively.
- Provide advice and guidance to managers on insurance-related matters.
- Ensure accurate records are maintained for all insurance policies and claims.
- Identify opportunities to improve insurance arrangements and deliver value for money.

What does success look like?

The organisation maintains appropriate and cost-effective insurance protection, claims are managed effectively, risks are understood and mitigated, and insurance arrangements provide assurance and value for money.

Procurement

- Lead the development and delivery of procurement policy, processes and procedures.
- Ensure procurement activities comply with legislation, organisational policies and governance requirements.
- Support managers through procurement exercises and tendering activities.
- Promote best practice procurement and value-for-money principles across the organisation.
- Develop procurement guidance, templates and documentation.
- Maintain oversight of procurement activity and contract compliance.
- Provide support and guidance to managers on contract management, including maintaining the contract register.
- Support supplier selection, evaluation and performance management processes.
- Support strategic contract review and renewal activities.
- Deliver training and awareness sessions to managers and stakeholders on procurement requirements.

What does success look like?



Procurement activities are compliant, transparent and efficient. Managers receive practical support throughout procurement processes, contracts deliver expected outcomes and are supported by effective contract management oversight, and procurement contributes demonstrable value for money and social value benefits for the organisation.

Leadership and people management

- Lead, develop and motivate the Financial Services team.
- Promote a culture of continuous learning, accountability and customer focus.
- Manage team performance, objectives and professional development.
- Embed the organisational values.

What does success look like?

A motivated, high performing team that are engaged and working towards clear and stretching goals. Service standards are consistently high, and finance is seen as a key contributor to organisational success

General

- To comply with Broadacres policies, procedures and code of conduct.
- To ensure all work undertaken and services provided are in compliance with the data protection legislation.
- Comply at all times with all organisational policies and relevant legislation including Data Protection, Equality & Diversity, Health & Safety and Financial regulations.
- To carry out any other duties consistent with the level of responsibilities of the post as may from time to time be required.
- Embrace BHA's sustainability ambitions to support Broadacres to be an environmentally friendly organisation
- Promote and demonstrate commitment to equality, inclusion and diversity ensuring BHA develops and promotes positive practices in all its customer activities.
- Embrace and promote the corporate plan, mission, vision, values and conduct of the association.

What does success look like?

An effective visible manager. The role holder fully embraces the corporate strategy and values, regularly communicates Broadacres' performance and progress with teams, ensures that operational processes and practices are complied with and inspires colleagues to deliver great customer experience.

Financial Services Manager

Person specification:

Job requirements	Essential	Desirable	Method of identifying criteria
Experience	• Significant experience of leading and managing financial operations, including accounts payable, cash book and payroll. • Demonstrable experience of implementing and maintaining effective financial controls and operational procedures. • Experience of managing supplier relationships. • Extensive experience of working with finance systems. • Experience of managing, motivating and developing teams.	Experience of social housing/not for profit sector. Experience of insurance policy and claims management. Experience of procurement and contract management. Experience of system implementation or change projects. Experience of implementing automation solutions.	Application form. Interview (may include presentation or occupational test where appropriate).
Skills	• Great people management skills - able to motivate, organise and lead colleagues. • A strong manager who can motivate a team to deliver great results • Attention to detail with a meticulous approach to tasks, ensuring there is accuracy in work and nothing is overlooked. • Well developed organisational skills – able to successfully manage competing priorities/projects and work to tight deadlines • Makes informed and timely decisions based on relevant evidence, data and professional judgement.	Financial systems administration and configuration skills. Process mapping and continuous improvement skills.	Application form. Interview (may include presentation or occupational test where appropriate).

	• Problem analysis - able to analyse problems, assess solutions and reach sound decisions. • Excellent written and verbal communication skills. • Relationship building - Ability to form successful professional relationships with customers,, external organisations and colleagues. • Delivers high performance by meeting agreed targets, standards and deadlines, staying focused and accountable in a performance-driven environment. •		
Knowledge	• Thorough knowledge of financial operations, processes and controls. • Knowledge of accounts payable, banking and payment processing procedures. • Knowledge of payroll legislation, statutory deductions and compliance requirements. • Procurement principles. • Finance systems, data integrity and controls. • Strong practical working knowledge of Excel.	Knowledge of procurement legislation, tendering and evaluation methodologies. Insurance management. Finance automation. Service improvement methodologies.	Application form. Interview (may include presentation or occupational test where appropriate).
Special requirements	• Role holders will work flexibly, balancing home working with regular presence across Broadacres' portfolio, typically 2 days per week in the office. Maintaining strong leadership visibility and an accessible leadership presence is a key requirement of the role. • Willing and able to work outside normal office hours. • Current driving licence.		Application form. Interview (may include presentation or occupational test where appropriate).
Qualifications	Relevant payroll or bookkeeping qualification at level 3 or above or equivalent experience.		Application form / Evidence through



			professional qualifications and certificates.
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