

# Finance Assistant

## Applicant Information Pack





## A warm welcome from SLSW

Hello,

Firstly, thank you for your interest in joining Shared Lives South West as a member of our Finance and Business Team.

Our focus is to provide people with high quality, person- centred support and that happens each and every day thanks to our incredible SLSW Carers and our committed staff team.

Since our humble beginnings in 2004, we have achieved many great things and have grown and evolved our services over the years. In 2019 we were rated 'Outstanding' by the Care Quality Commission and we are passionate about flying the flag for the care sector. Our staff team, SLSW Carers, people who use our services and volunteers all play vital roles in making SLSW what it is today.

We recognise the benefits of a diverse team and welcome people of all age, disability, gender identity, marital status, race, faith or belief, sexual orientation and socioeconomic background

So if you are looking to join a team who really put people at the centre of all they do please read on or contact us today.

We look forward to hearing from you,

**Laura Maker**  
**People and Culture Leader**



## About Shared Lives South West

Shared Lives South West recruits, trains and supports individuals and families (Shared Lives Carers) who can offer accommodation and care for adults with care and support needs in their home, enabling the person to share in family life and maintain their independence. This is known as Shared Lives.

Our service supports adults over 18 years of age and occasionally young people in transition into adult services from the age of 16 upwards. We currently support around 320 people on a long-term basis in around 290 shared lives homes and have up to a further 130 people using our short break services. We provide support to people with learning disabilities, people who have a diagnosis of dementia, a physical or sensory disability, mental ill health and parents who have a learning disability with their child. We currently have five contracts from Local Authorities across Cornwall, Devon and Somerset to support our work and a range of project funding totalling around £1.8 million per annum.

You can read more about the activities of Shared Lives South West on our website [www.sharedlivessw.org.uk](http://www.sharedlivessw.org.uk)

Shared Lives South West is a registered charity and a not-for-profit company limited by guarantee. We were established in 2004.





## Our vision, purpose and our values

**Our Vision** To be the leading Shared Lives provider in the country.

**Our Purpose** To make a positive impact on the lives of the people we support.

**Our Values** Putting **CARE** into everything we do...



**Community-** Working together with a shared purpose and belonging to achieve common goals.



**Autonomy-** Empowering people to take ownership and accountability for decision-making.



**Resilience-** Building the strength and character to embrace change and challenge.



**Equity-** Giving people what they need to have equal access to opportunities in life.



## The SLSW Team

Currently we have a staff team of almost 50 people working across SLSW led by CEO Dominic Spayne.

SLSW is made up of the Leadership team, Shared Lives Coordinators, Funding and Benefits, People and Culture team, Finance team and Admin.

## Quotes from staff about why they enjoy their role

“

Knowing that I am making a difference.

”

“

I enjoy putting time into how we support people to be their best.

”

“

I love the day to day problem solving and support skills that I can use in my role.

”

“

I help to make our processes as smooth and successful as possible, and keep people informed and included throughout.

”





## **Job description- Shared Lives Finance Assistant**

**Reporting to:** Chief Executive

**Working closely with:** Finance team  
Funding & Benefits team  
Shared Lives team

**Remuneration:** Starting salary: £23,302 FTE

**Hours:** 22.5 - 27 hours per week to be discussed and agreed at interview

**Days Worked:** Days worked to include a Monday

**Contract:** Permanent

**Based:** Zealley House, Kingsteignton, Devon

### **Purpose Statement**

To support the effective delivery of the organisation's financial processes and manage the administrative aspects of short breaks and respite bookings.



## Duties include:

### Finance

- To process weekly payment runs for suppliers, short breaks and respite, personal allowances for the people we support, and miscellaneous payments.
- To process daily bank reconciliations and bank transactions for all accounts, and keep bank account details for Carers and the people we support up-to-date.
- To support the Finance Manager in processing incoming invoices and outgoing payments for suppliers, purchasers and Carers, processing staff expenses, receiving and banking cheques, cash and credit card payments, and managing cash-flow records.

### Short Breaks

- Manage the short break service including taking bookings, processing Carer payments, raising purchaser invoices and credit notes, maintaining records and providing an input on the future development of the service.
- Ensure all bookings are made within agreed funding packages, liaising with Carers, the people we support and purchasers where necessary.
- Produce correspondence and provide any financial information for Carers and the people we support in respect of Short Break bookings.



- As required, support the production annual financial statements.
- Where required, assist the Finance Manager in pursuing overdue invoices.
- To be the point of contact within the Finance team for all matters relating to the short break service.

## Respite

- Manage the respite services including taking bookings, processing Carer payments, maintaining records and providing an input on the future development of the service.
- Produce correspondence and provide any financial information for Carers in respect of respite bookings.
- Regularly reconcile respite balances to ensure allowances are not exceeded, handling any overcharges and arranging repayments.
- Work with the Leadership team in identifying and allocating emergency respite.
- As required, support the production of annual financial statements.
- Complete annual reconciliation of provider respite allowances, process carried-forward balances and set up new records for the following financial year.





## Other duties

- Day to day liaison with the Shared Lives team regarding non-complex financial issues relating to providers and people who use SLSW services.
- Day to day administration relating to role, including filing, scanning, shredding and taking telephone calls.
- To maintain confidentiality at all times and ensure observance of the SLSW confidentiality policy.
- To contribute to the active development of the role to meet the needs of SLSW.
- Any other duties as directed by the Leadership team that may be appropriate to this post.



## Person specification

Having the right person in the role is really important to us. If you are interested in applying, but are not sure whether you have all the criteria listed on the person specification, please do get in contact with us.

<b>QUALIFICATIONS</b>	<p>A good level of general education to GCSE or above, including English and Maths.</p> <p>A commitment to professional development and willingness to undertake any training or qualifications that support the role.</p> <p>Entry level qualification in bookkeeping, e.g. AAT, ICB, IAB, or similar preferable, but not essential.</p>
<b>KNOWLEDGE AND EXPERIENCE</b>	<p>Experience of working in a similar office-based finance role.</p> <p>Sound financial knowledge.</p> <p>Experience of developing strong relationships as part of an effective customer service process.</p> <p>Experience of working for a charity or social care organisation preferable, but not essential</p>

<b>SKILLS AND ABILITIES</b>	<p>Good literacy and numeracy, able to record, analyse and use financial data, and report results in different formats with a thorough attention to detail.</p> <p>Good degree of computer literacy across Microsoft Office products (Excel, Outlook, Word), with experience of Sage software preferable, but not essential.</p> <p>Great interpersonal skills and an enthusiastic approach to customer service; can quickly establish good working relationships with a variety of agencies and individuals.</p> <p>Highly organised, with a calm and methodical approach to prioritising tasks and deadlines.</p> <p>Good written and verbal communication skills, able to tailor communication for a variety of audiences and circumstances.</p> <p>Able to work autonomously, problem solve, take responsibility for own actions and make decisions with minimal direction.</p>
<b>PERSONAL ATTRIBUTES</b>	<p>Cares deeply about people and is passionate about helping others to achieve their potential.</p> <p>Displays enthusiasm and vision to develop the role and is committed to improving the organisation.</p> <p>Highly motivated; strives for excellence in everything they do and you doesn't accept mediocrity in themselves or those around them.</p> <p>Positive, energetic, solution focused and challenging the status quo.</p> <p>Calm under pressure, flexibly, resourceful and resilient.</p>





## **If I join Shared Lives South West as part of the team what can I expect?**

You will be joining an enthusiastic and committed team of staff who are passionate about Shared Lives as a care model.

Shared Lives South West offers a rewarding role that enriches the lives of the people we support, a positive and supportive team environment and clearly defined salary progression, 25 days annual leave (plus bank holidays), which increases after two years.

Staff also have training and development opportunities.

We have a transparent pay structure with grades, ranges and progression and are committed to listening, engagement and communication. We hold staff events, forums and create surveys to gain valuable feedback from our staff team.

This is a permanent post and would be offered subject to satisfactory references and DBS check.



## Employee benefits

Some of the ways we show we care:

- Contributory pension scheme
- A people and culture strategy focused on resilience, inclusion, well-being and leadership
- Flexible approach to where we work, including hybrid working, where possible
- A supportive approach to family commitments including paid dependency leave
- A proactive approach to well-being including well-being hour, support with medical appointments and generous sick leave
- Cycle to work scheme
- 24-hour employee support line through mindful employer
- Group death in service insurance
- Personal accident and travel insurance cover





## How to apply

If you would like an informal chat about the role please contact Dominic Spayne, SLSW CEO, on **01626 360170**.

If you have any queries about the recruitment process, please email: **[people@sharedlivessw.org.uk](mailto:people@sharedlivessw.org.uk)**.

We welcome people regardless of age, disability, gender identity, marital status, race, faith or belief, sexual orientation and socioeconomic background and welcome applications from people who hold these identities.

Please complete the application form (CV's alone are not accepted) and return it via post or email it to the email address above. All candidates will be notified if selected for interview or not.

## Closing Date

9am on April 11, 2023.

## Interviews

Interviews take place in our Zealley House, Kingsteignton office on April 19, 2023.

## Further information

For further information on SLSW, visit our [website](#).

To read the latest SLSW Annual Report, [click here](#).

For information about how we use and store your data under the General Data Protection Regulations (GDPR) 2018, please refer to our [privacy policy](#).