

Finance Executive Job Description

Job Details	
Job Title:	Finance Executive
Reports to:	Head of Operations
Position within Structure:	Team Member
Salary:	£32,136 pro rata
Pension:	Charity Leadership Scotland will contribute up to 6% of salary provided the employee matches this. An employee may choose to contribute at a lower level of 4% or 5% which will be matched by Charity Leadership Scotland.
Annual Leave:	Full time employees are entitled to 25 days of annual leave in each year plus 11 days public holiday. Part time-employees accrue annual leave on a pro-rata basis.
Work Location:	Hybrid: On agreement, including working from home and at Greyfriars Charteris Centre, 138-140 Pleasance, Edinburgh, EH8 9RR.
Travel requirements:	Occasionally throughout Scotland.
Contract Type:	Permanent 21 hours per week Probationary period – 6 months Notice period – 4 weeks
Other:	Evening and weekend working may be required at times in order to staff and attend events and for other business requirements.
How to apply:	To apply for this post, please send your CV and covering letter (maximum two pages) detailing how you meet the essential criteria outlined in the person specification and your suitability for the role to: lucinda@charityleadership.scot by 12.00 pm on Friday 15 May 2026 .

Please include “Finance Executive Application” in the subject line of your email.

Interviews will take place in person in Edinburgh city centre on **Monday 8 June.**

We want to lead by example, and as such, we are particularly interested in seeing applications from underrepresented groups and those with lived experience of inequality. All applications are treated with fairness and equity.

As a Disability Confident Employer, we guarantee an interview to disabled applicants who meet the essential criteria for the role and will make reasonable adjustments throughout the recruitment process. If you wish to be considered under our guaranteed interview scheme or require adjustments, you can let us know in your application email or contact us separately at any stage of the process. Any information shared will be treated confidentially and used only for the purpose of providing support during recruitment.

We are committed to fostering a diverse and inclusive workplace. To help us monitor this, we invite applicants to complete an anonymous [equality and diversity questionnaire](#) following submission of their application.

This form is optional and cannot be linked to your application, so your responses will not affect the recruitment process in any way.

Offers of employment will be subject to satisfactory references, self-disclosure of unspent convictions and compliance with UK working restrictions. Under Scottish charity law, this position is considered a senior management function. If offered the role, you will be asked to complete a self-declaration to confirm that you are eligible to undertake this position.

We take your privacy seriously. Any personal data, including information provided to support reasonable adjustments, will be processed in accordance with our [Privacy Policy](#).

For an informal discussion about the role, please contact Lucinda Godfrey, CEO, lucinda@charityleadership.scot

Charity Leadership Scotland Overview and Job Purpose	
Charity Leadership Scotland Vision	<p>Charity Leadership Scotland is the membership organisation for Scotland’s voluntary sector leaders.</p> <p>Our vision is that voluntary sector leadership in Scotland is influential, resilient and trusted.</p>
Charity Leadership Scotland Aims	<p>Voice – We will advocate with, and for, voluntary sector leaders so the sector can make its full contribution to Scotland’s future.</p> <p>Challenge – We will support leaders to have the skill and confidence to hold the hard conversations that are needed to make the changes we seek for Scotland.</p> <p>Change – We will work with leaders to drive innovation to deliver a fair, inclusive, diverse and sustainable Scotland.</p>
Staff Values	<ul style="list-style-type: none"> • Courageous • Authentic • Open to challenge • Collaborative • Inclusive
Job Purpose	<p>The Finance Executive will work closely with the Head of Operations to ensure the efficient delivery of Charity Leadership Scotland’s financial operations, systems and controls. The postholder will deliver accurate financial processing, reporting and compliance, while supporting financial planning, budgeting and governance requirements.</p> <p>The postholder will support the planning and implementation of improvements to the organisation’s financial systems and processes, working with the Head of Operations and colleagues.</p> <p>The Finance Executive will deliver high quality service to Charity Leadership Scotland, its members, stakeholders and partners, embodying Charity Leadership Scotland’s Staff Values.</p>
Key Relationships	<p>Internal</p> <ul style="list-style-type: none"> • CEO • Senior Leadership Team • Board of Trustees members • All Charity Leadership Scotland staff <p>External</p> <ul style="list-style-type: none"> • Charity Leadership Scotland members • Auditors • Suppliers • Banks and financial institutions • Regulators

	<ul style="list-style-type: none"> • Strategic Partners • Volunteers • Event attenders
Further Information	Please contact Lucinda Godfrey, CEO, lucinda@charityleadership.scot for further information.

Main Duties and Responsibilities	
1. Financial Operations and Controls	<ul style="list-style-type: none"> • Maintain accurate and up-to-date financial records using accounting software and associated systems. • Process income and expenditure, including invoices, bank transactions, expenses and credit card activity, ensuring appropriate authorisation and adherence to internal controls. • Manage accounts payable and receivable, including monitoring aged debtors and creditors. • Undertake monthly bank reconciliations, control checks and month-end processes. • Support effective cash flow management and day-to-day banking arrangements. • Act as a first point of contact for routine finance queries from staff, volunteers and external contacts.
2. Financial Reporting, Budgeting and Compliance	<ul style="list-style-type: none"> • Prepare draft management accounts, financial reports and commentary for review by the Head of Operations, CEO and Treasurer. • Support the preparation of budgets, forecasts and monitoring reports, highlighting variances and risks. • Maintain appropriate bookkeeping records and liaise with external accountants/auditors to support year-end accounts. • Assist with statutory and regulatory requirements, including OSCR and Companies House filings, in conjunction with the Head of Operations and accountants. • Support the processing, monitoring and reporting of unrestricted and restricted funds, grants and funder claims.
3. Payroll, Systems and Processes	<ul style="list-style-type: none"> • Administer payroll and pension processes, liaising with external providers as required.

	<ul style="list-style-type: none"> • Act as a key contact for payment gateways and financial systems, working with colleagues to ensure effective operation. • Support the planning and implementation of improvements to the organisation’s financial systems and processes, working with the Head of Operations and colleagues. • Contribute to the ongoing development and improvement of financial systems and processes, including documentation of procedures. • Support the correlation of membership income between the CRM and finance systems, working with relevant colleagues.
<p>4. Governance, Administration and Support</p>	<ul style="list-style-type: none"> • Provide finance-related administrative support to Board and sub-committee processes as required, including preparation of financial papers. • Support governance administration relating to Trustees, including statutory registers and filings, as appropriate to the role. • Assist with AGM preparation from a financial and administrative perspective.
<p>5. Team and Organisational Contribution</p>	<p>As part of Team Charity Leadership Scotland, the Finance Executive will:</p> <ul style="list-style-type: none"> • Contribute to a positive member and stakeholder experience, ensuring finance-related queries are handled efficiently and professionally. • Ensure all records are accurate, complete and maintained in line with GDPR and organisational policies. • Work collaboratively and flexibly with colleagues to deliver organisational objectives. • Adhere to Health and Safety, Equality, Diversity and Inclusion and other organisational policies at all times. • Maintain and develop professional knowledge through relevant training and research. • Undertake any other reasonable duties as required.

Person Specification	
1. Education and Qualifications	
Essential	A1. Either: Ability to demonstrate the competencies required to undertake the duties associated with this level of post having acquired the necessary knowledge and skills in a similar role. Or: Scottish Credit and Qualification Framework (SCQF) Level 7 or equivalent, and experience of development in a similar or number of different roles.
Desirable	B1. Part-qualified or qualified finance professional (e.g. AAT, ACCA, CIMA or equivalent). B2. Knowledge of Scottish charity governance and OSCR requirements.
2. Skills	
Essential	C1. Strong attention to detail with a commitment to high levels of accuracy and meeting deadlines. C2. Ability to manage competing priorities and work independently, while recognising when to seek support. C3. Proactive, reliable and solutions focused. C4. Demonstrates honesty, integrity and a commitment to Equality, Diversity and Inclusion. C5. Strong Excel and Microsoft Office skills. C6. Comfortable working with finance systems, databases and CRM systems. C7. Clear and effective written and verbal communication skills. C8. Ability to present financial information clearly to non-finance colleagues. C9. Strong interpersonal skills and confidence liaising with internal and external stakeholders.
Desirable	D1. Ability to produce guidance, training materials and user instructions.
3. Experience	
Essential	E1. Relevant experience in a finance or financial administration role. E2. Experience of working with accounting or finance software systems (e.g. QuickBooks or equivalent) and understanding how they support organisational processes. E3. Experience of transactional finance, reconciliations and financial record keeping. E4. Experience supporting budgeting, financial reporting and year-end processes. E5. Experience supporting payroll and pensions administration. E6. Understanding of internal controls and financial compliance requirements.

	<p>E7. Experience contributing to the development or modernisation of finance systems or processes.</p> <p>E8. Experience of communicating effectively with internal and external stakeholders.</p>
Desirable	<p>F1. Experience working in a charity or membership organisation.</p> <p>F2. Experience of providing support to Boards or Trustees.</p> <p>F3. Experience of leading or supporting the implementation of a new finance system.</p> <p>F4. Experience of reviewing system options and engaging with software providers or consultants.</p> <p>F5. Experience of supporting staff through change, including producing guidance and/or delivering basic system training.</p>