

JOB SPECIFICATION:

Charities Manager

Name:		Effective from:	June 2026
Department:	Corporate Services		
Job Title:	Charities Manager		
Reports To:			
Hours / Days:	9am - 5.30pm (10am - 4pm core hours)	Monday - Friday	37.5 hours
Job Summary:	Responsible for managing a portfolio of clients providing timely, high quality compliance services for a range of charity and not-for-profit organisations.		

Key Activities:

1. Audit & Accounting

- Fully accountable for the timely provision of audit and accounting services including tax returns for a portfolio of charity and not-for-profit clients with annual fees in excess of £200,000.
- Supervise and control completion of audit assignments including systems and controls, planning and completion.
- Review and completion of audit file for review.
- Review and finalisation of work prepared and conclude on all final points for review.
- Effective communication with clients.
- Ensure company secretarial process is followed, including filing of annual returns with the Charity Commission, and advise clients of their responsibilities.
- Preparation of budgets for client work.
- Manage budgets and compliance for clients.
- Raising bills.

2. Continuous Professional Development, Specialisms & Strategy

- Active involvement in the firms Audit Working Group, Charities & Not-For-Profits Group and Corporate Team training programme.
- Drive improvement and accountability within the Team in line with our Strategy.
- Self management of CPD and ensuring up to date with Charity & Not-For-Profit specialism updates.
- Maintain software knowledge including Caseware Cloud and CCH Charities Accounts Production, and disseminate information, updates and best-practice among the Team.

3. Business Development & Client Management

- Manage and develop client relationships, including regular client contact by phone, emails and virtual meetings.
- Identify opportunities for additional services.
- Awareness of business development.
- Understand, engage and assist with the marketing activities of the business.
- Play an active role in raising the profile of the business.
- Display a confident, accurate and reliable accounting knowledge when interacting with clients.
- Actively engage with senior staff and Partners/Associates to gain a good understanding of the business.
- Liaise with clients for debt recovery as required.

4. Staff

- Mentor, supervise and coach staff assigned and contribute to non-client work.
- Delegate tasks effectively.
- Assistance with the recruitment and selection of staff.
- Responsible for training and development of direct reports including providing regular feedback.
- Review work of junior staff, ensuring quality in compliance with professional standards and requirements.
- Ensure Partner decisions on staff are promptly implemented.
- Ensure staff motivation and loyalty is maintained to minimize staff turnover.
- Ensure effective communication systems between management and staff are established and disseminated to all staff in the practice to ensure coherence and a positive team spirit.
- Monitor and encourage improvements towards standard of work via guidance, coaching and mentoring.
- Encourage and foster a culture of continuous development and improvement.
- Conduct annual appraisals and quarterly reviews for all direct reports.
- Actively manage direct reports in respect of holiday, sickness and day-to-day management.
- Highlight and recommend training requirements for direct reports.

5. General

- Undertake general administration tasks.
- Effectively communicate with colleagues within the organisation to promote teamwork across the group and assist in the development of internal relationships.
- Identify and meet personal job related training as required and to ensure CPD criteria is met.
- Provide assistance in terms of general and specific support to Partners/Associates as required.
- Undertake other reasonable work activities as determined by the Partners/Associates.
- Ability to work under pressure and cope with stressful situations.
- Excellent time management and an appreciation for the practicalities of time management within all aspects of professional work.
- Attend managers meetings as required.