Phoenix Space

Finance and Operations Officer

Job description and person specification

Phoenix Space is an international education charity supporting young people affected by displacement and disadvantage.

The Finance and Operations Officer maintains the **financial administration, operational processes and organisational systems** that enable Phoenix Space to deliver its programmes reliably.

Financial administration and accounting support form a substantial part of this role. Working with the Finance Director, and the external accountant, the officer maintains accurate records, supports reconciliations and reporting, tracks restricted funds and prepares financial information for review.

The officer also helps build and improve the organisation's infrastructure: implementing practical tools, connecting workflows and making processes easier for colleagues to follow. This includes systems supporting monitoring and evaluation, CRM, project administration and trustee approvals.

Consultancy • Up to 40 hours per week • Remote, with flexible scheduling and agreed availability during European working hours • Indicative fee £1,800–£2,000 per month, depending on experience and agreed scope. Detailed terms are agreed in writing.

Reports to COO and Finance Director, and works closely with programme leads, the Executive Assistant, fundraising colleagues and external accountants and advisers. Responsible for detailed financial and operational administration, checking required documentation and approval evidence, and following up outstanding actions and deadlines. COO retains oversight, financial judgement and management decisions.

Key Responsibilities

Financial administration and monthly close

- Collect and check invoices, receipts, expense claims, agreements and approval evidence. Confirm project/fund codes and refer to missing information or apparent duplication for correction.
- Prepare payment requests or authorised payment batches and maintain the Payment Authorisation Log with supporting-document links. Verify payment-detail changes through the agreed secure process.
- Maintain assigned accounting entries and schedules with the external accountant; prepare or support bank, card and platform reconciliations, explaining differences for independent review.
- Update income, expenditure, outstanding commitments and restricted-fund schedules. Distinguish pledges from receipts and available funds from future commitments.
- Prepare inputs for cash-flow forecasts, budget monitoring, reserves calculations, management accounts and donor financial reports for COO's review. Support documented shared-cost and consultancy allocations.
- Check consultant invoices against contractual records, required time entries and signed statements of work where applicable. The responsible manager verifies work delivered; the officer verifies financial and documentary completeness.
- Take an active role in the regular accounting cycle, including maintaining assigned accounting entries, preparing reconciliations and supporting the monthly close with the external accountant.
- Prepare clear schedules covering income, expenditure, restricted funds, outstanding payments and commitments for COO's review.
- Help improve the flow of information between programme managers, fundraising colleagues and the accountant so that financial reporting is accurate and timely.

Donors projects and agreements

Donor administration and due diligence

- Obtain information, coordinate documents and send routine administrative correspondence.
- Perform assigned, proportionate checks on donors, partners and relevant counterparties using reliable official sources and approved screening procedures. Record findings and refer concerns to COO and the designated safeguarding, AML, sanctions or data-protection lead.
- Maintain linked donor and donation records in the CRM, including amount, currency, purpose, restrictions, agreements, required approval evidence, reporting dates and payment schedule.
- Prepare complete approval requests for COO to route to the CEO or trustees. Keep unreceived amounts as Pledged; change to Received only after Finance confirms receipt. Send approved acknowledgements and retain the evidence.
- Support administration of fiscal-sponsor, donor-advised fund and third-party fundraising arrangements, checking documented purposes, deductions and permitted costs with COO. Do not independently vary donor restrictions or promise programme outcomes.

Project controls and readiness

- Use the Project Checklist with each responsible manager to verify that required project and financial approvals, current budgets, agreements, due diligence and relevant safeguards are evidenced before the affected activity or payment proceeds.
- Track donor and partner reporting obligations, missing records, amendments and expiry dates. Keep one action list with an owner, due date and evidence link; escalate unresolved prerequisites and delays to COO.
- Support scholarship payment administration by checking recorded decisions and supporting agreements with the programme team. Selection, student eligibility and delivery decisions remain with the authorised programme and management leads.
- At closure, check final financial evidence, commitments, balances, agreements and reporting status with the project owner and COO. Managers retain responsibility for programme delivery, narrative reports and lessons.

Contracts procurement and legal administration

- Maintain the contract/MoU and supplier registers, renewal dates and approved versions. Check required signatures, financial authority, procurement evidence and conflict disclosures; refer unusual terms to COO for legal review.
- Coordinate document packs for authorised signatories and advisers with the assistant. COO leads organisational legal matters; project managers may liaise directly with advisers within an agreed scope. The officer administers the process and does not provide legal advice.

People governance and organisational systems

HR administration

- Coordinate recruitment administration with hiring managers; maintain role/contract records, agreed fees, dates, reporting lines and secure personnel files.
- Run the administrative onboarding process: correct agreements and confidentiality terms, Code of Conduct, required declarations, policy acknowledgements, role-appropriate checks and training evidence. Avoid duplicate NDAs or forms where existing documents suffice.
- Coordinate account setup, authorised permissions and organisational induction; managers provide role induction, supervision and assessment of performance.
- Maintain agreed hours, paid-time-off records and contract renewal/review dates. Document approved changes to fees, responsibilities or terms before they take effect.
- Coordinate offboarding, preserve organisational files, arrange handover, remove access at the authorised time and support final financial closure under the contract.

Governance compliance and oversight evidence

- Maintain the Compliance Workbook and Calendar, trigger actions, Policy Register and supporting evidence. Distinguish draft policies from approved versions and track the actual review schedules.
- Prepare routine trustee papers and approval evidence for COO; track responses, decisions and follow-up. COO coordinates substantive trustee communication and confirms the decision route.
- Ensure required reviews are scheduled and their completion evidenced: financial controls, risk, reserves, safeguarding, conflicts, data protection and policy reviews. The designated lead performs the review and owns corrective action.
- Coordinate accountant/auditor information requests and annual reporting evidence under COO. Track regulatory filing deadlines and prepare submissions for authorised review and filing.
- Maintain assigned risk and action records, identify missing controls or repeated gaps and propose proportionate improvements. Reuse existing emails, registers and reports rather than creating unnecessary paperwork.

Systems data protection and backups

- Administer authorised Google Workspace, Slack, Monday.com, Clockify and other organisational accounts; maintain access logs, permissions, subscriptions and required security settings, including multi-factor authentication.
- Own backup execution and records in line with the agreed calendar; verify coverage and test restoration. Seek technical help where needed and escalate failures or security concerns promptly.
- Coordinate the Data Processing Register, access reviews, retention/deletion actions and assigned privacy checks under COO and the designated Data Protection Contact. Refer new high-risk data uses or transfers for specialist review.
- Work with COO and relevant colleagues to identify system requirements and translate them into practical workflows.
- Coordinate and carry out agreed implementation tasks for tools such as an M&E platform, CRM and trustee approval system. This may include configuration, forms, approval workflows, data preparation and migration, testing and rollout.
- Set up straightforward integrations or automations where appropriate, involving external technical support when specialist work is needed.
- Document how systems should be used, support colleagues during rollout and maintain clear guidance and access arrangements.
- Review whether tools are being used effectively, identify duplication or gaps and propose improvements within agreed budgets.
- Protect restricted records and promptly route incidents and rights requests.

Authority workload and person specification

Authority and working relationships

The officer may request missing evidence, return incomplete requests and refer unresolved requirements to COO before processing. They work within current approved delegations: this job description grants no authority to approve budgets, accept high-risk donations, sign contracts or act as the MLRO, safeguarding lead, data-protection specialist or auditor. Payment preparation must have separate authorisation and review. Urgent protective or incident action follows the relevant reporting route without waiting for routine meetings.

Work cycle and priorities

When	Core work
Ongoing and event driven	Invoices, donor/partner onboarding, approvals, contracts, recruitment/departures, security incidents and reporting deadlines.
Monthly	Close/reconciliation support; consultant records; commitment/fund tracking; inputs to cash flow, reserves and management accounts; evidence for COO and CEO reviews.

When	Core work
Quarterly and annual	Prepare required trustee and allocation-review information; backups under the calendar; annual accounts/audit evidence, control reviews, policy dates and filing support.

COO sets priorities and reviews workload regularly. Urgent safeguards, financial deadlines and contractual obligations take precedence. Initial record cleanup, Drive migrations, registrations and other substantial projects need a defined scope, time allowance and expert support. New work is reprioritised within agreed capacity rather than added indefinitely.

Essential experience and skills

- **Practical financial administration or bookkeeping experience**: invoices, reconciliations, coding, spreadsheets, accurate records and accounting systems.
- **Understanding of charity or grant-funded operations,** restricted funds, approval evidence and the need to separate preparation from authorisation.
- **Experience coordinating operational records, processes, deadlines and checks** across several people; able to identify gaps and follow them through diplomatically.
- **Strong English and digital skills**; confident with Google Workspace, spreadsheets and CRM/task systems; able to manage routine account administration securely.
- Ability to understand colleagues' needs, organise data, test processes and explain systems clearly to users.
- Discretion with financial, personnel and beneficiary information, sound judgement, and the ability to recognise when specialist advice is required.

Desirable experience and initial success measures

Desirable: UK charity governance, international programmes, donor/partner due diligence, HR administration, audit preparation, Monday.com, Clockify, workflow improvements or relevant finance qualifications. Specialist legal or technical expertise is supported externally where required.

In the first three months, establish one usable calendar/register set, agree the finance cycle and accountabilities, prioritise inherited evidence gaps with owners/dates, and confirm access/backup arrangements. Success means timely and traceable records, reliable financial inputs, completed checks, early escalation, secure handovers and fewer repeated requests for missing information.

Success measures

- Financial records, payment documentation and reporting inputs are accurate, complete and timely.
- Required approvals, agreements and due-diligence evidence are recorded and traceable.
- Compliance deadlines and outstanding actions have clear owners and timely follow-up.
- Onboarding, contract changes and offboarding are documented and coordinated.
- Access permissions, backups and sensitive records are maintained securely.
- Missing information, discrepancies and significant risks are escalated early.
- The COO receives clear information for decisions, reporting and audit preparation.

Additional Perks

The consultancy arrangement includes up to three weeks of agreed paid breaks per full year of engagement, proportionate to the agreed weekly hours and length of engagement. For a 40-hour week, this is up to 120 hours annually. These hours replace working time within the agreed annual fee budget; they are not an additional payment.