

Finance & Administration Manager

CANDIDATE BRIEFING DOCUMENT

Retirement Planning Council
of Ireland



2into3
Transforming Social Impact

June 2024

ABOUT RETIREMENT PLANNING COUNCIL OF IRELAND

The Retirement Planning Council of Ireland (RPC), established in 1974, is a not-for-profit organisation dedicated to helping individuals in preparing for a successful and fulfilling retirement.

They seek to enhance the quality of life in retirement and focus on providing comprehensive education and guidance on various aspects of retirement planning.

This includes financial planning, health and wellbeing, social changes, and legal considerations, ensuring that individuals are well-equipped to navigate the transition from working life to retirement.

Overall, the Retirement Planning Council of Ireland play a crucial role in informing, educating and creating an awareness in Ireland of the need for preparation for retirement, promoting positive aging and supporting individuals through the transition to retirement.

For more information about the Retirement Planning Council, visit www.rpc.ie.

Retirement Planning Council
of Ireland



MISSION

“To be the best provider of trusted programmes and independent guidance by providing training, advocacy and lifetime support for people approaching and during their next stage of living.”

VISION

“Where all can create and embrace their own future.”

VALUES

Support, Empowerment, Impact, Expert, Independent and Respect

STAFF STRUCTURE

3 administrative staff and 15 contract speakers.

FINANCIAL INFORMATION

In the year ending December 2023, the Retirement Planning Council had total income of €940,022 and total expenditure of €845,432, leaving a net surplus of €94,590.

GOVERNANCE

The Retirement Planning Council of Ireland is an independent organisation limited by guarantee with registered charity status (Charity Number CHY5895). The Retirement Planning Council of Ireland is also registered with The Charities Regulatory Authority (RCN: 20009663). The Board is currently chaired by Ray Kenny and is comprised of 10 members.

CONTEXT FOR APPOINTMENT

This is a new position within the Retirement Planning Council, bringing the accountancy and finance capability inhouse.

This position will play a key role in developing the organisation's financial decision-making strategy.



THE POSITION

Title	Finance and Administration Manager
Reporting to	Retirement Planning Council of Ireland's CEO
Direct Reports	None
Place of Work	Remote (<i>occasional onsite meetings, access to office possible if preferred</i>)
Working Hours	Full-time (37.5 hours per week)
Contract Type	Permanent (<i>subject to completion of 9-month probationary period</i>)

ROLE SUMMARY

Reporting to Chief Executive Officer, the Finance & Administration Manager will be responsible for managing all financial administration practices within RPC in support of the organisation's mission, values and goals.

The Financial & Administration Manager will have ownership of accounts management, compliance, budgets and various other key financial operations including financial control and year end reports.

This position is a hands-on financial role and will play a key role to support strategic decision-making to grow the Retirement Planning Council.

Accounting Administration

- Manage payroll, pension scheme, PAYE/PRSI in conjunction with the outsourced partner.
- Manage the booking of venues for the annual calendar of courses nationwide and ensure that course bookings are properly recorded, and that members and other clients are billed correctly and promptly for course fees and membership subscriptions.
- Maintain the Corporate and Individual Membership records.
- Ensure that all financial transactions are promptly and accurately recorded in the books of account.
- Ensure accurate reconciliation of supplier invoices / statements and RPC financial records.
- Reconcile monthly debtor balances, creditors activity and bank accounts.
- Ensure Xero Accounting cloud-based system is regularly updated.



Budget Management

- Develop and manage the RPC annual budget in co-ordination with CEO.
- Contribute towards commercial decision making by ensuring accurate costings, tender analysis, margin analysis and pricing analysis.
- Support the CEO in researching, applying for and developing tenders for government and / or philanthropic funding for future RPC courses.
- Manage bank accounts to ensure sufficient liquid funds and liaise with the CEO in relation to the investment surplus cash.
- Monitor and manage all expenses within the established budget, including but not exclusive to third party payments.
- Purchase all office supplies, course materials, software licenses and equipment replacements, as necessary.



Financial Controls / Management

- Review and maintain overall financial management systems and controls within RPC.
- Prepare detailed monthly and quarterly management accounts for RPC management and board and reports as required by RPC board subcommittee(s), including full details of all courses, together with appropriate variance analysis.
- Manage month-end and year-end accounting closure procedures.
- Use company financial performance data to help monitor KPIs and inform future strategic direction.

Auditing and Reporting

- Prepare draft annual accounts to trial balance for external audit purposes and liaise with the external auditor to ensure smooth completion of the annual audit.
- Analysing data and draft financial reports, providing clear and comprehensive explanations to support informed decision-making.



Governance and Compliance

- Implement approved accounting policies, ensuring full compliance with FRS 102 and the requirements of the Companies Act 2014.
- Monitor the level and type of insurance cover held.
- Maintain and regularly update all RPC Policy and Procedures Manuals – Employee Handbook, Health & Safety Statement, with special emphasis on the CRA Governance Code.
- Review and maintain the RPC Risk Register.
- Maintain Asset and Employees Registers.
- In conjunction with the Board, senior staff members and outsourced partners, ensure RPC operates in full compliance with current VAT, Taxation and Charity Regulator requirements.

These duties are a general guide to the responsibilities of the Finance and Administration Manager. They are neither definitive nor restrictive. The post-holder may be required to undertake other duties commensurate with the post.

KPIs / PRIORITIES AFTER 6 MONTHS

After 6 months in the role, you will be expected to be working towards the following KPIs and priorities:

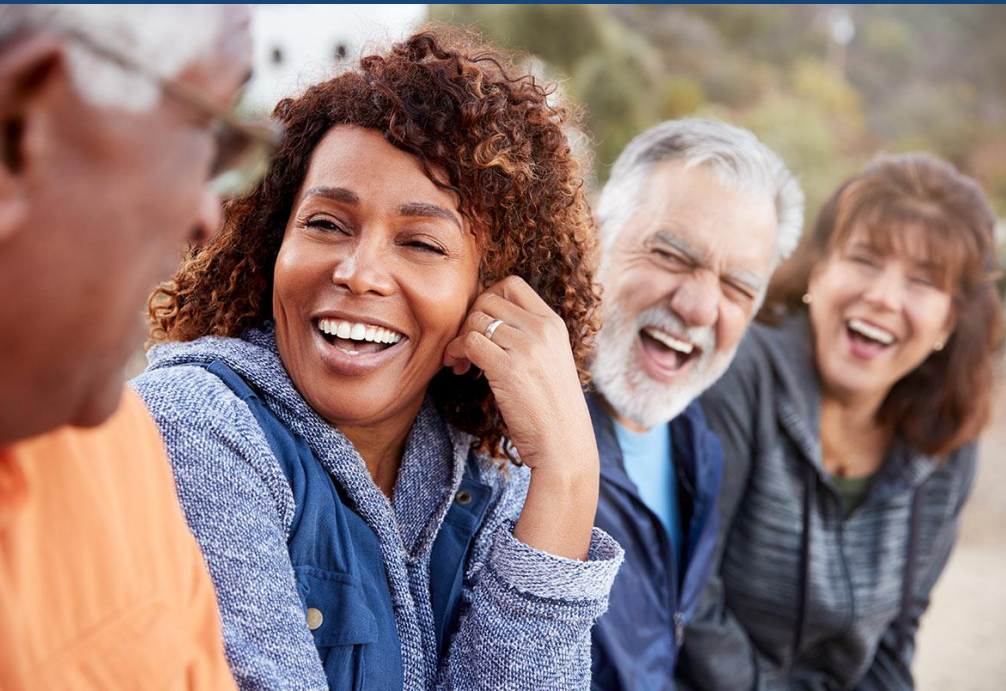
- ✓ Have a comprehensive understanding of the organisation's mission, values, ethos and service delivery.
- ✓ Have a clear understanding of the Irish retirement sector/rules and regulations.
- ✓ Successful management of all day-to-day finance and accounting tasks including budget and cash flow ownership.
- ✓ Present succinct and relevant reports to the finance committee and board (KPIs etc.).

PERSON PROFILE

RPC are seeking an experienced professional with a proven track record of hands-on finance and administration management in a small dynamic organisation.

The ideal candidate will possess strong communication skills, be comfortable working in a hybrid/fully remote capacity with a clear understanding of and appreciation for RPC's purpose.

They will appreciate the importance of strong governance, be committed to ensuring the RPC can continue to succeed in the work it does and will continually act in the best interests of the organisation.



CORE COMPETENCIES AND SKILLS

Criteria	Essential	Desirable
Track record of achievement in a similar role	✓	
Qualified accountant – ACCA/ACA/CIMA or equivalent	✓	
Strong communication skills (written and verbal)	✓	
Ability to present and explain financial data to support informed decision-making	✓	
Strong relationship management and interpersonal skills	✓	
Strong attention to detail and excellent project management skills	✓	
Excellent IT skills	✓	
An analytical mindset with the ability to anticipate future challenges and opportunities, enabling effective planning and proactive decision-making	✓	
Ability to work to challenging deadlines and manage a varied workload with minimal supervision	✓	
Strong knowledge of corporate governance and charity regulations.		✓
Experience of working to develop financial elements of new funding applications, grant writing, etc.		✓
A passion for RPC's values and mission	✓	

If this role is of interest to you and you believe you have what it takes to be successful, but don't necessarily believe that you meet every single criterion in the table above, please do still get in touch so we can discuss further how you may be a fit.

REMUNERATION

A salary of €60,000 - €65,000 is offered for this position, depending on experience.

Non-pay related benefits include:

- Employer contribution of 10% of salary towards pension/life cover.
- 21 days annual leave.



APPLICATION PROCESS

Recruitment for this role is being managed exclusively by 2into3.

If you are an experienced financial manager looking to take on a hands-on and rewarding role, please send your CV and cover letter outlining your suitability for the role (in Word document format only) to H el ene McArdle.

All enquiries regarding the role will be held in strictest confidence.

Applicants must possess valid authorisation to work in Ireland.

Closing date for applications is **Friday 12 July 2024.**

- Email helene.mcardle@2into3.com
- Address The Academy, 42 Pearse St, Dublin D02 YX88
- Telephone +353 1 574 0028
- Website www.2into3.com

The Retirement Planning Council is an equal opportunities employer who believes that diversity is a strength in the workplace. We therefore welcome applications from suitably qualified candidates, irrespective of gender, disability, marital or parental status, racial, ethnic or social origin, colour, belief, religion or sexual orientation.

At 2into3, we endeavour to make all reasonable accommodations to facilitate the participation of candidates with disabilities in the recruitment process. Please let us know if you require any specific accommodations.