

Job description

Together we are help and hope for everyone living with dementia



Who we are

Dementia is the UK's biggest killer. One in three people born in the UK today will develop dementia in their lifetime.

At Alzheimer's Society, we're the UK's leading dementia charity and the only one to tackle all aspects of dementia by giving help and hope to people living with dementia today and in the future. We give vital support to people facing the most frightening times of their lives, while also funding groundbreaking research and campaigning to make dementia the priority it should be.

Together with our supporters, we're working towards a world where dementia no longer devastates lives.

Our values

Our values tell everyone who we are as an organisation.

Our values make sure that our focus is clear for the challenges and opportunities ahead and remind us of what we all stand for.

Our values are evident in everything we do, how we do it and how we work together.

These are not just words on a wall, we live these every day in all our work. We are determined to make a difference when and where it matters most, by being passionate, focussed and making a lasting impact for people affected by dementia.



Determined to make a difference

We're passionate, we're focused and we make a lasting impact for everyone living with dementia.



Trusted expert

We're listening, we're learning and we use experience and evidence.



Better together

We're open, we combine our strengths and we achieve more together.



Compassionate

We're kind, we're honest and we don't shy away from challenges.

Through our values we will make the greatest difference for people affected by dementia. Whether you are someone living with dementia, a family member or carer, a supporter, a donor, a colleague from another organisation, an employee or a volunteer, these four values will shape your experience with Alzheimer's Society.

Financial Planning & Analysis Manager

Position in the Organisation

Reports to: Head of Financial Partnering, Planning & Analysis

Line manages: Lead FP&A Analyst (Grade F), FP&A Analyst (Grade E) and Assistant FP&A Analyst (Grade D)

Member of: Financial Partnering, Planning & Analysis

Directorate: Finance & Assurance

Purpose of this Role

At Alzheimer's Society we are advisors, supporters, fundraisers, researchers, influencers, communicators, technical specialists and much more. We are volunteers, we are employees, and together we are here to make a difference to the lives of people with dementia and their carers.

In Finance & Assurance, our vision is to be the Society's single point of truth. We are trusted partners and credible experts, working as one team to enable the organisation to make impact to end the devastation of dementia.

The FP&A Manager will lead the Society's Financial Planning & Analysis function, bringing together financial planning, forecasting, modelling and analysis into one coherent team. The role will operate at a strategic level, shaping the frameworks, standards, insight and decision support that allow senior leaders to allocate resources confidently and respond quickly to opportunities, risks and financial pressures.

This is a senior managerial role within Financial Partnering, Planning & Analysis. The postholder will act as deputy to the Head of Financial Partnering, Planning & Analysis as required, represent the function in senior forums, and lead the FP&A team to provide a reliable single point of truth for financial performance, planning assumptions, scenario analysis and strategic decision-making.

Key Accountabilities and Responsibilities

- Lead the operational delivery and continuous development of the Society's FP&A function, ensuring financial planning, analysis, modelling, reporting and insight support organisational strategy, resource allocation and decision-making.
 - Act as deputy to the Head of Financial Partnering, Planning & Analysis as required, including representing the team in senior meetings and supporting the delivery of wider FPP&A priorities.
 - Develop, maintain and oversee the delivery of Society-wide budgeting, forecasting and multi-year planning frameworks, including timetables, assumptions, governance processes, tools, communications and quality assurance.
 - Implement and maintain FP&A standards, methodologies and quality expectations for budgeting, forecasting, modelling, reporting and analysis, ensuring these are consistently applied across the Society.
 - Translate organisational strategy, business planning assumptions, financial performance and external trends into clear financial scenarios, options and recommendations to support senior decision-making.
 - Provide oversight of financial analysis, ensuring that financial models, trend analysis, cost analysis and performance insight are robust, accessible and used to inform resource allocation and decision-making.
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- Be accountable for the integrity, governance and continuous improvement of the single point of truth for FP&A outputs, ensuring strong alignment with Financial Partnering, Financial Accounting, Finance Systems and wider directorate teams.
- Build strong and influential relationships with senior leaders across the Society, understanding strategic objectives, constructively challenging assumptions, and proactively identifying financial risks, opportunities and optimisation choices.
- Prioritise the FP&A workload and resource allocation, balancing cyclical activity, senior stakeholder requirements, project support and continuous improvement priorities.
- Oversee the development and maintenance of standardised planning models, reporting products, dashboards and analytical outputs, ensuring they remain scalable, well-governed and easy for business partners and senior stakeholders to use.
- Provide senior-level reporting on the effectiveness of budgeting, forecasting and analysis frameworks, including recommending changes where processes are not supporting timely, confident decision-making.
- Influence senior leaders and colleagues across Finance & Assurance to adopt consistent planning assumptions, evidence-based financial decisions and agreed FP&A standards, balancing challenge with constructive support.
- Lead delivery of the FP&A improvement roadmap, identifying, prioritising and implementing enhancements to planning, forecasting, reporting, modelling and analytical capability to meet changing organisational needs.
- Provide specialist support and financial leadership for highly complex or strategically significant projects, working alongside Financial Partnering and other Finance & Assurance colleagues.
- Lead, develop and line manage the Lead FP&A Analyst and FP&A Analyst building capability, accountability and a high challenge, high support culture.
- Manage the capacity, performance and development of the FP&A team, ensuring clear objectives, effective workload allocation, succession planning and continuous learning.
- Work with the Head of FPP&A and other people leaders to identify performance metrics, feedback loops and quality indicators that support ongoing improvement across Partnering, Planning & Analysis.

We are looking for someone who can...

- Understand the role of Finance & Assurance as an enabling partner directorate and link financial planning, analysis and decision support back to the Society's objectives.
 - Work collaboratively across Finance & Assurance and the wider Society to provide clear, trusted and timely financial expertise.
 - Role-model the Society's values and contribute to a high challenge, high support, high performing environment.
 - Drive continuous improvement, using feedback, data, best practice and lessons from implementation to improve quality and engagement.
 - Have the ability and willingness to travel independently on behalf of the Society on request, including occasional overnight stays as required.
 - Adhere to the Society's service standards, policies and procedures, including data protection, confidentiality, inclusion, health and safety, and management information requirements.
 - Support personal learning and development and contribute to the learning and development of others.
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Person Specification and Selection Criteria

Skills and Knowledge

Criteria	Application (A) or Interview (I)
CCAB qualified accountant (e.g. ACCA, CIMA, CIPFA) with demonstrable post-qualification experience operating at a senior FP&A or finance management level.	A
Significant experience of leading financial planning, budgeting, forecasting, modelling and analysis in a large or complex organisation.	A
Strong strategic judgement, with the ability to interpret complex financial and non-financial information and advise senior leaders on options, risks and trade-offs.	A/I
Excellent communication, influencing and negotiation skills, with credibility to engage, challenge and secure commitment from senior stakeholders across multiple directorates.	A/I
A track record of designing and improving planning, forecasting or analytical frameworks, including governance, standards, tools and performance measures.	A
Experience of leading high performing, accountable teams, including objective setting, workload management, development and performance management.	A/I
Experience of setting functional standards, governance arrangements or operating frameworks for financial planning, forecasting, reporting or analysis across a large or complex organisation.	A/I
Strong understanding of finance systems, processes and data, preferably including ERP systems such as Unit4 and reporting or modelling tools.	A
Experience of producing professional-grade reports, recommendations and presentations for senior and executive audiences.	A
Ability to work across departmental and hierarchical boundaries to resolve complex issues and maintain a single point of truth.	A/I

Competencies and Personal Attributes

Criteria	Application (A) or Interview (I)
Takes initiative and is comfortable working independently as well as collaboratively.	A/I

Criteria	Application (A) or Interview (I)
A critical thinker, able to identify and act on ways to work more effectively and efficiently.	A
Focuses on progress, solutions and impact rather than activity.	I
Delivers effectively to timelines in complex and sometimes ambiguous environments.	A
Committed to the development of yourself and others.	A
Resilient and adaptable, with a strong work ethic and the ability to navigate change.	I
Welcoming and respectful of diverse perspectives, experiences and opinions.	A
A team player who sees value in working together to solve problems.	I