

Financial Planning Analyst

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 Analyst

Position in the organisation

Reports to the Financial Planning Manager.

Line Manages Financial Planning Assistant.

Member of our Financial Partnering, Planning & Analysis team that sits within the Finance team.

Part of our Finance & Assurance directorate.

Purpose of this role

At Alzheimer's Society we are advisors, supporters, fundraisers, researchers, influencers, communicators, technical specialist and so 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, credible experts, working as one team to be a true enabler to the organisation as it makes impact to end the devastation of dementia.

Partnership, collaboration, accountability, professionalism and a restless desire to constantly improve are needed in every role across Finance & Assurance. Being able to effectively plan how and when we spend the Society's money is a critical capability.

The Financial Planning Analyst plays an important role in ensuring we deploy precious financial resources effectively, and with confidence and clarity. This role works across Finance and with budget holders across the Society to develop strategically aligned, financially disciplined plans.

In practice, that means supporting effective and insight-driven budgeting and forecasting processes, supporting their integration with corporate and business planning and constantly improving our ability to plan and use our funds efficiently and effectively

We are looking for someone who exemplifies our values, someone who is: **Determined to make a difference** when and where it matters most. **A trusted expert** who believes in working **Better together** and demonstrates true **Compassion**.

Key accountabilities and responsibilities

- Collaborate with colleagues in the Financial Partnering, Planning and Analysis team (including the Financial Analysis team and Finance Business Partners) to support a joined-up, single point of truth across all aspects of financial oversight for our partners across the Society so teams are constantly equipped with the tools and insight they require.
- Support end-to-end delivery of financial forecasting and budgeting processes, including communications, timetables and data requirements from budget holders, analysts, financial accountants and business partners.
- Drive continuous improvement in processes and products owned by the team. Use technology and tools available to minimise manual inputs, improve productivity, streamline processes and encourage use of a single source of truth

- Create regular management account packs for budget holders for use by business partners, and other colleagues, supporting high quality, engaging products produced on a timely basis.
- Work collectively with colleagues across the Society to better integrate business planning with financial planning.
- Support the Financial Planning Manager with the production of multi-year budgeting frameworks, helping to build understanding and engagement with associated processes and tools.
- At an operational level, gather and respond to feedback and analytics around the usage and performance of our budgeting and forecasting frameworks, recommending changes as necessary through a lens of constant quality improvement.
- Alongside peers in our Financial Analysis team, ensure financial modelling and analysis informs our approach to budgeting and forecasting.
- Support the awareness of and proactive responses to evolving best practice in budgeting and forecasting to support the Society's ambition to always be at the leading edge of innovation in this area.
- Support reporting on the effectiveness of our budgeting and forecasting frameworks and how they are supporting the whole Society to make faster, better, more confident decisions to drive impact.
- Build strong relationships with others across the Finance team, developing strong feedback and status loops to ensure a single point of truth is communicated to colleagues.
- Support the Financial Planning Manager in identifying key performance metrics and indicators to underpin constant quality and performance improvement across the team.
- Through effective development of the Financial Planning Assistant, and with the support of the Financial Planning Manager, role-model a high challenge, high support culture with accountability and performance as critical drivers to success, ensuring individual and team development is front and centre of our approach to Financial Planning.

We are looking for someone who can...

- Understand the critical role of Finance & Assurance as an enabling partner directorate in ultimately creating impact to end the devastation of dementia, linking everything you do back to the ultimate objectives of the Society.
- Work collaboratively and enthusiastically with colleagues across Finance & Assurance and across the Society more widely to deliver first class partnership and expertise.
- Role-model our values and embrace a high challenge, high support, high performing environment.
- Drive continuous improvement, including through bringing best-practice from across the sector and more widely, using horizon-scanning and networks to bring new ideas to the table.
- Have the ability and willingness to travel independently on behalf of the Society on request, including occasional overnight stays as required.
- Adhere to all the Society's service standards, policies and procedures.

- Comply with the data protection regulations, ensuring that information on clients remains confidential.
- Be enthusiastic for personal learning and development, to support the learning and development of others and the whole organisation.
- Work in a manner that facilitates inclusion, particularly of people with dementia.
- Implement the Society's health and safety policy and procedures, ensuring that all practices and procedures are undertaken in accordance with a healthy and safe working environment and that all staff and volunteers for whom you may be responsible are aware of their responsibilities in respect of their role, monitoring data and recommending action as required.
- Administrate and organise own work to ensure that it is accurate and meets quality targets, reasonable deadlines, and reporting requirements.
- Follow the Society's management information guidelines and requirements

Person specification and selection criteria

Skills & knowledge	Application (A) or Interview (I)
Applications welcomed from part qualified or AAT accountants. Support with accountancy training will be available to the successful candidate.	A
Experience of communicating with and influencing colleagues across a large or complex organisation. Capable of working across team boundaries to resolve challenges.	I
Experience of extracting relevant data from Finance systems, analysing it and manipulating it to produce useful financial reports.	I
Experience of producing management reports in various formats – using Excel, PowerPoint, and preferably Power BI.	I
Experience of working with finance systems and processes, preferably with working knowledge of ERP finance systems such as Unit4.	A
Experience of working with Excel extensively to build financial models, data collection templates, management reports, etc.	I
Experience of – or a willingness to develop in – managing and developing junior colleagues, supporting learning, career development and performance.	A
Knowledge of financial planning, budgeting and forecasting processes and tools.	A
Experience of supporting quality or performance improvement through metrics and reporting.	A
Experience of producing high quality reports for a range of audiences.	A

Competencies & personal attributes	Application (A) or interview (I)
Takes initiative and is comfortable working independently as well as collaboratively	A
A critical thinker, able to identify and act on ways to work more effectively and efficiently	I
Celebrates progress, solutions and impact rather than activity	I
Delivers effectively to timelines in complex and sometimes ambiguous environments	I
Deeply committed to the development of yourself and others	A
Resilient and adaptable, with a strong work ethic and the ability to navigate changing situations and diverse teams.	I
Welcoming and respectful of diverse perspectives, experiences, and opinions	A
A team player who sees opportunity and energy in working together to solve problems	I

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Our benefits



Financial Security

- Group Personal Pension Plan with Scottish Widows – with up to 8% employer contribution rate
- Life Assurance Scheme – two times your annual salary
- Society Plus and Smart Spending App – giving you unbeatable savings at hundreds of retailers



Health & Wellbeing

- Health Cash Plan
- 24/7 Employee Assistance Programme including online and face to face counselling
- Discounted gym membership with Society Plus
- Lived Experience Networks
- Mental health app and unlimited therapy



Personal Development

- Apprenticeships
- Women in Leadership development programme
- Leadership development programme
- Financial support towards relevant professional qualifications



Family & Dependants

- Enhanced family leave – 16 weeks paid for all parents
- Paid time off work for fertility treatments for both partners
- Paid carers leave
- Paid dependants leave
- Paid compassionate and bereavement leave
- Paid time off work to support those transitioning



Recognition

- Annual people awards
- Long service awards
- Thank you eCards
- Values Hero and Society Legend Awards



Work Life Balance

- Annual leave of 27 days increasing to 30, plus bank holidays
- Career breaks of up to 3 months
- Flexible working
- Wellbeing leave