

# Assistant FP&A 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.

# Assistant FP&A Analyst

## Position in the organisation

Reports to the Financial Planning & Analysis Manager

No direct line management responsibility. 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. The ability to plan effectively, interrogate data rigorously, and produce clear and insightful analysis are all critical capabilities for this team.

The Assistant Financial Planning Analyst plays an important supporting role in the FP&A team, contributing to budgeting, forecasting, financial modelling and reporting across the Society. This role helps ensure we always have a reliable, accurate and well-presented single source of financial truth from which colleagues can make sound, informed decisions.

In practice, that means supporting budgeting and forecasting cycles, producing management accounts and reports, contributing to financial modelling and analysis, and helping to develop intuitive and well-maintained financial products for colleagues across the Society.

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 across the FP&A team and Finance Business Partners to support a joined-up single point of truth, ensuring teams across the Society are always equipped with accurate, timely financial information.
- Support end-to-end delivery of financial forecasting and budgeting processes, including maintaining templates, timetables and data collection from budget holders, financial accountants and business partners.
- Produce and maintain regular management account packs, dashboards and other reporting products for use by Finance Business Partners and budget holders, ensuring outputs are accurate, well-presented and delivered on time.

- Support the integration of business planning with financial planning by working with colleagues across Finance and Assurance and the wider Society to ensure plans are grounded in sound financial data.
- Support the FP&A Manager and wider team with the production of multi-year financial models and budgeting frameworks, helping to maintain associated tools and build understanding across the team.
- Contribute to the development and maintenance of financial models and analytical tools, supporting the production of scenario analysis, trend analysis and other evidence-based outputs that inform planning and forecasting assumptions.
- At an operational level, gather and respond to feedback on the quality and usability of our budgeting and forecasting products, recommending changes as necessary in support of continuous quality improvement.
- Help maintain awareness of evolving best practice in financial planning and analysis, supporting the team's ambition to be at the leading edge of innovation in this area.
- Support reporting on the effectiveness of our FP&A frameworks and how they are helping the Society to make faster, more confident decisions and drive impact for people affected by dementia.
- Build strong collaborative relationships across the Finance and Assurance Directorate, maintaining clear feedback and status loops to support a consistent single source of financial truth for colleagues.
- Support the FP&A Manager in identifying key performance metrics and indicators to underpin constant quality and performance improvement across the team.
- With the support of the FP&A Manager, role-model a high challenge, high support culture with accountability and performance as critical drivers to success, contributing actively to individual and collective development within the FP&A team.

## **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.
- Use technology and tools available to minimise manual inputs, improve productivity, streamline processes and encourage use of a single source of truth
- 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.
- Administrate and organise own work to ensure that it is accurate and meets quality targets, reasonable deadlines, and reporting requirements.
- Drive continuous improvement in processes and products owned by the team.

- Have the ability and willingness to travel occasionally for team meetings, away days, etc., including occasional overnight stays as required. This is unlikely to be required more than a few times a year.
- 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.
- Follow the Society’s management information guidelines and requirements

## Person specification and selection criteria

Skills & knowledge	Application (A) or Interview (I)
Qualified to AAT Level 4 (or equivalent), preferably with a desire to progress towards a full accountancy qualification.	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 including ERP finance systems such as Unit4.	A
Experience of working with Excel extensively to build financial models, data collection templates, management reports, etc.	I
An enthusiasm for working as part of an integrated team, sharing knowledge and supporting a high-challenge, high-support working environment.	A

Knowledge of financial planning, budgeting, forecasting and financial analysis 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