

Finance & Business 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.

Finance & Business Planning Analyst

Position in the organisation

Reports to the Head of Organisational Effectiveness.
Member of our Organisational Effectiveness team.
Part of our Chief Operating Officer's Office 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.

Within the Chief Operating Officer's directorate, our role is to ensure the organisation is working efficiently and effectively to deliver its strategy and to be well positioned for long-term success.

Partnership, collaboration, accountability, professionalism and a restless desire to constantly improve are needed in every role across our teams. The Financial Analyst plays a pivotal role in ensuring – through robust and expert financial analysis – we always have a single point of truth from which to make sound, informed financial decisions. This role has their finger on the pulse of a range of sources – internal and external – to ensure we are always proceeding based on the very best assessments of markets, conditions and our internal financial numbers.

This role will also work closely with cross-directorate stakeholders, such as the People Transformation team, in shaping the future experience of our colleagues and volunteers. This role will support the team in ensuring that our long-term people strategies are sustainable, future-focused, grounded in a clear understanding of organisational capacity and value, and aligned to our financial reality.

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

- Provide expert financial & business analysis and insight on financial & business performance, policy and regulatory changes, market trends, and conditions within the third sector and wider economy, to support effective decision-making and drive organisational efficiency and long-term sustainability.
- Work closely with the Organisational Effectiveness team to interpret operational data, identify trends, and provide insight into drivers of performance, efficiency and capacity.
- Develop clear, engaging and insightful reporting that translates complex financial data into meaningful intelligence, enabling leaders to understand performance, risks, opportunities and areas for efficiency.
- Build strong relationships across the Society to understand strategic priorities and operational pressures, using this insight to develop financial models and scenario analyses that test the impact of potential changes and support informed planning and resource allocation.

- Support the development of robust budgeting, forecasting and reforecasting approaches, underpinned by high-quality financial analysis and forward-looking assumptions.
- Lead on the effective use of financial & operational data to identify efficiencies, assess value for money, and support continuous improvement across the organisation.
- Ensure financial & business analysis is accurately mapped, produced, clearly presented and appropriately governed.
- Build strong, collaborative relationships across the COO function, embedding effective feedback loops and shared ownership of high-quality analysis, insight and reporting.
- Role-model best practice in financial & business analysis, knowledge-sharing and prioritisation, actively managing analytical workload and flexing resource in response to changing organisational needs.
- Contribute to efficiency reviews by analysing workflow, cost drivers, and resource utilisation to identify opportunities for improvement.
- Provide analytical support to organisational effectiveness projects, offering insight, modelling and analysis to organisational change initiatives, ensuring decisions are evidence-led and financially sustainable.

We are looking for someone who can...

- Work collaboratively and enthusiastically with colleagues across directorates 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, including ensuring appropriate monthly measures on service usage levels are collected and submitted on the services database or other systems in accordance with deadlines.

Person specification and selection criteria

Skills & knowledge	Application (A) or Interview (I)
CCAB qualified accountant or part-qualified e.g. ACCA, CIMA, CIPFA (or equivalent) by education or demonstrable knowledge	A
Proven ability to curate and present financial analytics for diverse audiences, with strong communication and influencing skills to engage confidently across all levels and directorates, including making informed recommendations on financial planning.	A
Capable of working across departmental and hierarchical boundaries to resolve challenges.	A
Working knowledge of the financial planning, budgeting and forecasting processes and how to inform/improve them with expert analysis.	A
Experience of analysing complex financial data, including trends over time and historical data to inform models to allow confident directorate or team-based forecasting.	A
Proven understanding of the external financial environment, ideally within the third sector, with the ability to draw on a range of internal and external data sources and networks to inform or challenge financial analysis	A
Experience of monitoring and measuring the effectiveness or impact of financial analysis.	A
Experience of analysing financial results, including ratios, costs and returns on investments.	A
(Where applicable) Experience of, or a strong enthusiasm for, developing high performing assistants, supporting their learning, career development and performance management. This may include overseeing the administration of a formal qualification.	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	A
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