

## Job Description

<b>Job Title</b>	Finance Business Manager	<b>Grade</b>	3
<b>Department</b>	Finance	<b>Reports</b>	1.5
<b>Reports to</b>	Head of Finance		

### Our values

The role holder will be expected to operate in line with our company values of:

- Progressive
- Warm
- Excellent
- Thoughtful

Values are the principles that drive our behaviours. They are organisation-wide and should be adopted by everyone. Behaviours provide a consistent standard we can all expect inside the organisation from one another, and towards our members and stakeholders.

### Main purpose of the role

The Finance Business Manager will play a pivotal role in the financial stewardship of the organisation, ensuring robust financial planning, detailed analysis, and insightful reporting to drive strategic decision-making. This role will support senior management with forecasting, budgeting, and performance analysis, ensuring that APM's financial resources are used effectively to maximise our impact.

### Dimensions & Limits

The role holder will have oversight of APM's financial planning process, including budgets, forecasting and cashflow. They will manage a small team consisting of a Finance Business Partner and part of the time of a Management Accountant and will have regular interaction with budget holders, senior management, project managers and business department leaders.

### Key relationships

#### *Internal*

- Head of Finance and Finance team
- Leadership Team
- Heads of Departments
- Budget holders

#### *External*

- Auditors

### Career development

We are a learning organisation and want our employees to learn and grow during their time with us. There are many ways in which they can do this:

- Personal development days offer an opportunity to attend interactive bite sized training events.
- Our fantastic knowledge share calendar of events enables colleagues to share their knowledge with each other as well as access to a coach or mentor to help employees to navigate their chosen career paths.
- Shadowing in other departments is a popular way to learn about the roles and challenges across the different functions.

## Key responsibilities / accountabilities

### *Financial planning*

- **Co-ordinate budgeting process:** lead the organisation-wide budgeting process, ensuring timely and accurate preparation of budgets.
- **Forecasting:** develop financial forecasts and models to predict future financial performance and support strategic planning.
- **Budget review:** review and analyse departmental budget submissions for accuracy and alignment with strategic goals.
- **Scenario analysis:** perform scenario analysis to assess the impact of different financial strategies and decisions.
- **Cash flow:** preparation of cashflow to support financial planning.
- **Budget holder management:** liaison with budget holders
- **Financial systems:** oversight and maintenance of financial planning systems (working with the Systems Accountant)

### *Financial analysis*

- **Performance:** conduct monthly and quarterly financial performance reviews, comparing actual results to budgets and forecasts. Analyse variances in financial performance, identifying trends, issues, and opportunities for improvement.
- **Ongoing monitoring:** continuously monitor financial performance against budgets, providing regular updates and reports to management.
- **Cost allocation:** evaluate and recommend methods for cost allocation to ensure accurate financial reporting. Identify cost-saving opportunities and recommend efficiency improvements.
- **Forecasting:** Provide accurate revenue forecasts to support financial planning and resource allocation. Analyse revenue streams to support revenue growth strategies.
- **Reporting:** draft papers analysing performance both past and future for senior management and the Board (minimum bi-monthly).

### *Process improvement*

- **Process evaluation:** continuously evaluate financial processes and procedures, identifying areas for improvement. Implement best practices in financial planning, analysis, and reporting to enhance efficiency and accuracy.
- **System enhancements:** Leverage financial software and technology to streamline processes and improve financial reporting. Implement automation tools to reduce manual processes and improve data accuracy (working with the Systems Accountant).

### *Team management*

- **Supervision:** lead, mentor, and develop the team, providing guidance and support. Identify training and development needs for team members, fostering a culture of high performance and continuous improvement.
- **Interdepartmental collaboration:** work collaboratively with other departments to support their financial needs and ensure alignment with overall financial strategy. Promote knowledge sharing and best practices within the finance team and wider business.

### Key performance measures

- **Accuracy:** accurate financial forecasts and budgets compared to actual results.
- **Financial planning timeliness:** budgets, forecasts and other reporting completed on time, meeting the planning cycle deadlines.
- **Report quality:** accuracy and comprehensiveness of financial reports, including adherence to standards and clarity of presentation.
- **Cost/resource savings:** savings identified and implemented through process improvements.

### Person specification – Finance Business Manager

Attribute	Essential	Desirable
Qualifications	<ul style="list-style-type: none"> <li>• Fully qualified in a recognised professional accounting qualification e.g., ACA, ACCA, CIMA</li> </ul>	<ul style="list-style-type: none"> <li>• Financial analysis certifications (e.g., CFA, CPA) or charity sector-specific training</li> </ul>
Experience	<ul style="list-style-type: none"> <li>• Experience in financial planning and analysis</li> <li>• Managerial experience.</li> <li>• Proven experience in budgeting, financial forecasting, and performance analysis</li> </ul>	<ul style="list-style-type: none"> <li>• Experience working within the non-profit or charity sector</li> </ul>
Knowledge	<ul style="list-style-type: none"> <li>• In-depth knowledge of accounting principles, budgeting, forecasting, and financial analysis.</li> <li>• Familiarity with UK financial regulations, charity laws, and reporting requirements.</li> </ul>	<ul style="list-style-type: none"> <li>• Understanding of financial challenges and regulations specific to the charity sector</li> </ul>
Skills	<ul style="list-style-type: none"> <li>• Strong ability to analyse financial data, identify trends, and make data-driven recommendations</li> <li>• Proficiency in financial modelling, advanced Excel skills, and experience with financial management software</li> <li>• Ability to prepare clear and comprehensive financial reports and effectively communicate with stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>• Experience with specific financial software or reporting tools beyond basic proficiency</li> <li>• Skills in project management and process improvement</li> </ul>
Behaviour / Competency	<ul style="list-style-type: none"> <li>• High level of integrity and commitment to ethical financial practices</li> <li>• Proven leadership qualities with effective team management skills</li> <li>• Strong attention to detail, ensuring accuracy and completeness in financial reports.</li> </ul>	<ul style="list-style-type: none"> <li>• Ability to think strategically and align financial planning with the charity's mission and goals</li> <li>• Genuine passion for APM's mission and values, demonstrating strong motivation to contribute to its success.</li> </ul>