THE ROYAL BRITISH LEGION

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JOB DESCRIPTION

Job Title: **Finance Business Partner (Regions)**

Reporting to: **Senior Finance Business Partner (Operations)**

Role Purpose: To deliver pro-active financial, commercial and business advisory support in an efficient and effective manner to the Assistant Directors and Management Teams responsible for the Regional activities of the Legion (annual budget c.£15m), namely:

- 16 area offices and pop in centres
- Provision of welfare and specialist support services to beneficiaries
- Membership support officers

Key Responsibilities:

- To work with the management teams of the units to deliver both tactical and strategic Business Development Plans. This is likely to include active involvement (as team member or project lead) in major projects which have a significant financial or commercial dimension.
- Critically review and challenge draft budget and forecast data. Partner with the budget holders to jointly ensure their submitted budgets are complete, deliverable, and accurate, avoid duplications or gaps across budget holders and departments and remain within the overall financial framework targets.
- Coordinate the submission of (and undertake regular monitoring and interpretation of performance against) operating, capital and cash flow budgets for each unit;
- To work with each unit to produce an updated quarterly financial forecast and financially evaluate their longer-term strategic plans.
- To provide financial, commercial and business advisory support and expertise to colleagues at all levels within the units (including the development and reporting of key performance indicators and metrics);
- To produce, review (for reasonableness, accuracy and key financial trends and concerns) and distribute monthly management accounts and other periodic financial reports to tight deadlines – and identify/review/discuss material variances in detail with managers and agree remedial action plans.
- To undertake regular site visits to ensure that financial administration and controls (including working capital management) are operating effectively;
- To assist managers to ensure that any material accounting miscoding or other accounting errors are identified on a timely basis, corrected and remedial action plans agreed and implemented (to permanently eradicate systemic and other causes of accounting inaccuracy). These action plans might include, for example, publishing standard financial data on the intranet, running relevant training courses, agreeing systems changes to Open Accounts and other IT systems, improving reports and recommending upgrades to financial controls.

- To attend monthly management meetings to present consolidated and departmental monthly financial results, draw out major financial trends and issues – and discuss appropriate corrective business measures.
- To review at an 'oversight' level the reasonableness of accounting checks and controls within the units (and associated support functions) and make recommendations to resolve any identified issues (this is likely to involve leading on or supporting the preparation or upgrading of Financial Procedures Manuals and Standard Operating Procedures);
- To produce and distribute other financial management information as requested from time to time by the Senior Finance Business Partner (Operations), Head of Financial Planning and Analysis, CFO, Finance Director and other Directors;
- To maintain strong and effective relationships with other members of the Finance, Internal Audit and IT Departments and colleagues in the Operations Directorate;
- Under the guidance of the Senior Finance Business Partner (Operations), to conduct reviews and evaluations of cost-reduction and 'Value for Money' opportunities (including development of relevant costing / commercial models).
- To maintain an up to date personal level of financial competence/knowledge, including keeping abreast of changes in financial regulations and legislation directly affecting the Charity and welfare sectors.
- Any other duties as are within the scope, spirit and purpose of the job, the title of the post and its grading as requested by the line manager or Head of Department (HoD)

This job description reflects the current requirements of the role. As duties and responsibilities change and develop, the JD will be reviewed and will be subject to amendment in consultation with the post-holder.

The successful candidate will also need:

1. To implement the Equal Opportunities Policy into your daily activities.

2. To be responsible for your own health and safety and that of your colleagues, in accordance with the Health & Safety at Work Act (1974) and relevant EC Directives, including reporting any health and safety hazard immediately you become aware of it.

3. To work in accordance with the Data Protection Act (1998) and to ensure all new systems are reported to the Data Protection Officer.

PERSON SPECIFICATION

CRITERIA	ESSENTIAL / DESIRABLE	HOW MEASURED
QUALIFICATIONS		
Degree level education or equivalent	**D**	Application / Certificate
Accountancy Qualification	**E**	Application / Certificate
KNOWLEDGE AND EXPERIENCE		
Relevant and appropriate experience in finance and management accounting obtained in a complex organisation.	**E**	Application
Prior involvement in: • Variance reporting and investigation • Commercial support and advice to user departments • Budgeting and forecasting at a department/directorate level (including review and challenge) • Cost modelling • Developing management information reports to meet the needs of key stakeholders	**E**	Interview
Experience of working in welfare based organisation	**D**	Application / Interview
Knowledge of a variety of accounting systems and financial reporting approaches	**E**	Application / Interview
Knowledge of Open Accounts and eBis	**D**	Application / Interview

COMPETENCIES		
Effective Communications – Level 2 Able to communicate complex information using appropriate media to a financial and non-financial audience	**E**	Interview
Teamwork – Level 2 Actively seeks to build strong working relationships across Directorates/teams	**E**	Interview
Customer Service – Level 2 Commercially aware and focused on delivering value for money and efficiency whilst understanding the needs of front line services	**E**	Interview
Relationship Building – Level 2 Able to engage effectively and with a high level of personal credibility with a range of audiences and seniorities (from Director level downwards)	**E**	Interview
Problem Solving – Level 3 Able to interpret complex information to spot trends, identify issues and devise innovative solutions.	**E**	Interview
Planning and Organising – Level 2 Able to manage a complex and varied workload and deliver to tight deadlines	**E**	Interview
SKILLS AND ATTRIBUTES		
Good attention to detail to ensure data integrity and accuracy.	**E**	Assessment
Able to demonstrate an understanding of Charity SORP and Charity Law and regulation.	**D**	Application / Interview
Strong IT skills – competent user of MS Office and familiar with in-house database systems	**E**	Interview
Empathy with mission and values of the Legion	**E**	Interview