



THE ROYAL BRITISH LEGION

JOB DESCRIPTION

Job Title: Senior Business Partner - Fundraising

Reporting to: Head of Financial Planning & Analysis

Responsible for:

- Finance Business Partner - Fundraising

Role Purpose:

- To lead and deliver strong and effective financial management for the Fundraising Directorate at The Royal British Legion, which represents an annual income target of £112m and an expenditure budget of £42m.
- The purpose of the role is to assist the different Fundraising teams in delivering their net income targets, develop a portfolio of products to generate reliable and sustainable income streams, and deliver an outstanding supporter care service.
- You will provide senior financial and commercial support, analysis and advice to enable decision making on a sound financial basis, oversee value for money, and challenge performance - which will ultimately drive improvements and efficiencies for the organisation as a whole.
- You will need to develop trusted relationships with the senior management team in the Directorate and help them produce financial projections, budgets, forecasts, and business cases, ensuring alignment with organisational strategy.
- You will take a lead role to ensure that new projects are subject to effective financial planning and commercial control, influence budget holders and provide technical and strategic insight in order to achieve the Directorate's overall objectives.

Key Responsibilities:

Planning

- To lead the Fundraising finance team to work with the Director, Assistant Directors, Heads of Departments, other budget holders and Management Teams to support the preparation of long term strategic plans, annual budgets and quarterly reforecasts.
- Proactively interact with the Director and the senior executive team to encourage a value for money, impact driven, evidence based approach to resource allocation and product delivery which is aligned to strategic priorities.
- Review and challenge draft budget and forecast data in partnership with the budget holders to jointly ensure submitted budgets are complete, deliverable,

accurate, avoid duplications or gaps across budget holders and departments, deliver value for money and remain within the overall financial framework targets.

- Coordinate the submission of budgets to deliver to annual planning time frames and to ensure the necessary management information is received from and provided to other Directorates on a timely basis.

Reporting and Analysis

- To lead the Fundraising finance team to ensure delivery of useful, accurate and timely monthly management reports, comparing against budget and forecast, to all budget holders. This will include structuring reports to capture and analyse data effectively as well as identifying and correcting any mis-postings and addressing the cause of any errors in the management accounts so that the numbers are trusted.
- To lead the review of the monthly management reports and ensure comprehensive and insightful analysis and commentary on key variances for the Director and Senior Management team, and to support board reporting. Ensure these are well understood by budget holders and action is taken to manage these where necessary.
- Attend monthly management meetings to present consolidated and departmental monthly financial results, drawing out major financial trends and issues.
- In partnership with the Director, Senior Management team and relevant budget holders, identify and conduct analysis which could support improving value for money, efficiency, operational improvements or strategic decision making. This would include developing relevant costing or commercial models.
- Support implementation of relevant KPIs.

Ad-hoc

- Lead and support development and evaluation of business cases for all major new areas of spend.
- Working with colleagues in the Legal and Procurement functions to ensure that contracts for the supply and purchase of external services are commercially sound and incorporate appropriate commercial clauses to protect the Legion's short and long term commercial interests (such as break clauses, clarity of supply obligations, inflation protection etc.)
- To work closely with business partners from other support functions (HR, Procurement, PMO) to maintain effective oversight of business operations and provide joined up support to the Directorate.
- Provide finance project management and reporting for all new change programmes and projects as required to support ensuring that these are delivered on time and on budget.
- Engage with the Finance Analyst and Finance Systems Team to develop reporting tools as required.
- Lead other business partners on team projects as required.

General

- Manage and develop one CCAB qualified Business Partner, ensuring that they are motivated, set clear objectives, provided with training and support to develop their skills and that their performance is monitored and directed to the achievement of organisational objectives.
- Develop effective and influential working relationships with the Director and Senior Management teams and HoD's and with finance colleagues.
- Ensure financial planning and reporting controls are operating effectively and address administrative issues which impact on this.
- Ensure all relevant policies, processes and procedures are documented, highlight where these are not being implemented effectively and make recommendations for improvements.
- In partnership with Financial Accounts and Business Processing, ensure appropriate financial checks and controls are in place and reviewed including appropriate reconciliations and an up to date delegation of authority schedule.
- Represent Finance on cross-organisational projects relating to financial processes within Support Directorates.
- 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 Chief Financial Officer.
- 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 sector and which will impact on Operations Directorate supported.

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:

- To implement the Equal Opportunities Policy into your daily activities.
- 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.
- 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, APPLICATION/ CERTIFICATE/ INTERVIEW/ ASSESSMENT
QUALIFICATIONS		
Educated to Degree level or equivalent	D	Application
CCAB Accountancy Qualification	E	Application/ Certificate
KNOWLEDGE & EXPERIENCE		
<p>Relevant and appropriate experience in finance and management accounting obtained in a complex organisation. This includes</p> <ul style="list-style-type: none"> • Variance reporting and investigation • Commercial support to user departments • Budgeting and forecasting • Develop management information reports to meet the needs of key stakeholders 	E	Application/ Interview/ Assessment
Experience of working in both a commercial based organisation and a charity demonstrating knowledge or experience of strong financial management and charity accounting principles.	E	Application/ Interview
Experience of working with and influencing senior management teams	E	Application/ Interview
Experience of presenting to Senior management and report writing at a Senior level	E	Application/ Interview/ Assessment
Experience of working with Fundraising teams	D	Application/ Interview
Experience of managing and developing staff	D	Application/ Interview
Experience of contributing to organisational strategy through financial and corporate planning	D	Interview
COMPETENCIES		
Effective Communications – Level 2	E	Interview

Relationship Building – Level 2	E	Interview
Customer Service – Level 2	E	Interview
Problem Solving – Level 2	E	Interview
Planning and Organising – Level 2	E	Interview
SKILLS AND ATTRIBUTES		
Ability to perform accurate insightful analysis of complex financial data and communicate this clearly to finance and non finance audiences.	E	Interview
Strong IT skills – competent user of MS Office and familiar with in-house database systems	E	Application/ Interview
Commercially aware and focussed on value for money and efficiency whilst maintaining front line services.	E	Interview
Empathy with mission and values of the Legion.	E	Interview
Knowledge of OpenAccounts or similar accounting and reporting systems and tools	D	Application/ Interview