

Financial Planning & Analysis Manager

REQ241137

As part of the University's ongoing commitment to redeployment, please note that this vacancy may be withdrawn at any stage of the recruitment process if a suitable redeployee is identified.

The Finance Office includes c.45 colleagues who deliver financial support to the University. Teams within the department include Financial Control, Financial Management, Tax, Procurement and Financial Systems. The teams operate together to cover all aspects from transactional finance through to the development of the University's long-term financial plan and delivery of the £320m+ per annum revenue budget.

Job Description

Job Grade: Management and Specialist Grade 7

Job Purpose

You will lead the core processes within the FP&A team, including the monthly management accounts, quarterly forecasts and annual budgeting cycle, generating timely and clear reporting to help understand University performance. You will seek to deliver continuous improvement and leverage use of technology and data to drive strategic decision making.

Job Duties

Line Management and Team

- Line management of direct reports, including day to day management and PDR/probation reviews.
- Support the team in processing a range of tasks including the loading and tracking of budget /forecast changes, processing of journals, allocating costs, pay forecasting etc.
- Support the team in communicating financial performance of areas of responsibility
- Lead and encourage the team to provide consistent and uniform approaches to work, generating benefits through identifying and addressing inefficient ways of working.
- Assist with other ad hoc analysis as required

Monthly reporting, forecasting and budgeting

- Lead the team in coordinating University wide inputs to forecasts and budgets, ensuring clear cascade of the processes and issuance of clear timelines.
- Drive standardisation in templates and guidance issued to stakeholders.
- Undertake monthly reviews for designated areas, summarising into easily digestible management reporting.
- Support and input into monthly Management Accounts
- Drive improvements with regards to the coordination of the month-end, quarterly forecast and budget processes, joining up these processes as far as possible.
- Support completion of quarterly forecasts and preparation of the quarterly forecast update report
- Collaborate with the Finance Business Partners to ensure that departmental budgets are reflected in the overall University budget/forecasts, understanding how the designated departments are reflected within the University financial forecast.

- Provide significant input to the University financial forecast, ensuring that updates are made in line with agreed timelines.
- Draft reports, presentations and committee papers as requested, helping to generate clarity over financial metrics.
- Act as FP&A representative in University wide projects, as required. Provide appropriate financial information to support decision making including the assessment of risk and identification of sensitivities.
- Ensure compliance with financial regulations, technical accounting requirements, legal requirements or University policy and procedures.

Improvements

- Work with the Head of Financial Management and wider Finance function in delivering improvements to accounting structures, processes, controls and reporting to generate efficiencies.
- Lead improvements in team/department use of budgeting/forecast tools, driving automation and improving reporting outputs.
- Work with Finance Business Partners and establish close working relationships in order to facilitate process improvements/change projects, sharing knowledge & encouraging team to do so
- Develop and maintain professional working relationships with the wider Finance team and other Professional Services to aid in supporting the financial management role.
- Work with the Head of Financial Management in continuing to develop the FP&A function & defining future direction

Communication

- Work as a senior member of the Finance department, liaising with members of the wider University.
- Support senior management teams, University committees and project management boards as required.
- Network widely with staff across the University while working closely with the Finance team to ensure service objectives are achieved.
- Respond to requests for support on any financial, statistical or administrative matter.

Training

- Support the training needs of the departments' personnel in aspects of financial management and raise the awareness of the departments' management teams.
- Attend appropriate personal development courses and maintain requirements for continuing professional development as required by qualifying institute.
- To support training and development within the Finance team, acting as a training mentor to a training accountant where requested.

Functional Contacts

- All colleagues within the University Finance team.
- Other Professional Services departments within the University, including but not limited to the Planning Office and the Research and Innovation Office.
- Internal and External auditors
- Director of Finance, Provost, Chief Operating Officer and other senior management as may from time to time, be required

Points to Note

The purpose of this job description is to indicate the general level of duties and responsibility of the post. The detailed duties may vary from time to time without changing the general character or level of responsibility entailed.

Special Conditions

All staff have a statutory responsibility to take reasonable care of themselves, others and the environment and to prevent harm by their acts or omissions. All staff are therefore required to adhere to the University's Health, Safety and Environmental Policy & Procedures.

All staff should hold a duty and commitment to observing the University's Equality & Diversity policy and procedures at all times. Duties must be carried out in accordance with relevant Equality & Diversity legislation and University policies/procedures.

Successful completion of probation will be dependent on attendance at the University's mandatory courses which include Respecting Diversity and, where appropriate, Recruitment and Selection.

Organisational Responsibility

Reports to the Head of Financial Management

Person Specification

As this is a career graded post, the requirements of the person specification increase with each level of qualification as per the table below. Your application will be reviewed against the appropriate level of essential and desirable criteria listed below. Applicants are strongly advised to explicitly state and evidence how they meet each of the essential (and desirable) criteria in their application. Stages of assessment are as follows:

Essential Criteria

Area	Criteria	Stage
Experience	Significant experience of working within a large and complex financial environment, with some specific knowledge and experience of fulfilling a management accounting or FP&A role.	1,3
	Significant experience of coordination of financial processes involved in preparation of monthly results, budgets and forecasts.	1,3
	Experience of working with a range of colleagues and stakeholders.	1,3
	Experience of working under pressure, demonstrating self-motivation and workload prioritisation	1,3
Skills and abilities	Ability to learn and use finance systems effectively, alongside advanced Excel skills.	1,3
	Advanced financial modelling and data analysis skills.	1,3
	Ability to write reports for differing audiences, including committees, and internal and external bodies.	1,3
	Ability to present information to and communicate with internal and external stakeholders clearly and succinctly, including to non-finance staff and senior management.	1,2,3
	Ability to prioritise work for self and others in order to meet deadlines.	1,3
Training	Demonstrable commitment to continuing professional development and compliance with the requirements of relevant qualifying institute.	1,3
	A willingness to undertake further training and to adopt new procedures.	1,3
Qualifications	Educated to degree level or equivalent	1,3
	Fully qualified accountant with a recognised qualifying body (ICAEW, CIPFA, CIMA, ACCA)	1,3

Desirable Criteria

Area	Criteria	Stage
Experience	Experience of Higher Education	1,3
	Experience of dealing with external fund providers, including submission of claims to funding bodies.	1,3
	Participation in a governance structure involving lay/non-executive members, including committee work.	1,3
	Advanced working knowledge of Agresso and Planner	1,3
Training	Supporting accountants in their training, acting as mentor.	1,3

Conditions of Service

The position is full-time and open-ended. Salary will be on management and specialist Grade 7, £46,485 to £55,295 per annum. Subject to annual pay award. Starting salary to be confirmed on offer of appointment.

The appointment will be subject to the University's normal Terms and Conditions of Employment for Grades 6 and above staff, details of which can be found here.

The University is committed to enabling staff to maintain a healthy work-home balance and has a number of family-friendly policies which are available at <http://www.lboro.ac.uk/services/hr/a-z/family-leave-policy-and-procedure---page.html>.

We also offer an on-campus nursery with subsidised places, subsidised places at local holiday clubs and a childcare voucher scheme (further details are available at: <http://www.lboro.ac.uk/services/hr/a-z/childcare-information---page.html>)

In addition, the University is supportive, wherever possible, of flexible working arrangements. We also strive to create a culture that supports equality and celebrates diversity throughout the campus. The University holds a Bronze Athena SWAN award which recognises the importance of support for women at all stages of their academic career. For further information on Athena SWAN see <http://www.lboro.ac.uk/services/hr/athena-swan/>