



## THE ROYAL BRITISH LEGION

**Job Title** Finance Analyst

**Reporting To** Head of Financial Planning & Analysis

### **Role Purpose:**

- To consolidate, review and analyse monthly, quarterly and annual financial data across the Legion group.
- To provide support to Finance Business Partners and enable them to develop accurate financial reports for their directorates in an efficient manner.
- To act as a link between the Financial Planning & Analysis team and the Finance Systems team.

### **Key Responsibilities:**

#### Planning and Forecasting

- Work with the Finance Systems Team and Finance Business Partners to ensure the budget and forecast process, templates and guidance are fit for purpose.
- Set and coordinate timings for budgeting and forecasting to ensure the output can be reviewed and approved according to annual planning time frames.
- Review and reconcile to ensure consolidated budget and forecast data is accurate, working with Business Partners to solve discrepancies.

#### Monthly Reporting and Analysis

- Support Head of FP&A to coordinate the monthly timetable for financial reporting and ensure it fits in with the broader Finance Directorate timetable.
- Work with the Finance Systems Team and Finance Business Partners to ensure all budget holders receive accurate and timely monthly management accounts.
- Working with the Finance Systems Team and Head of FP&A, deliver accurate and timely consolidated monthly management accounts, reporting against budget, forecast and prior year, supporting analysis to ensure all variances are understood and explained in reporting received from Finance Business Partners.
- Identify opportunities for the organisation to drive cost efficiencies, maximise operational, fundraising and investment returns, and deliver improved performance.
- Provide insight to help senior management to understand the performance of the organisation and make decisions about future direction and strategy.
- Deliver central reporting on capital and revenue projects and other areas to support Executive Board (EB) understanding of the monthly financial reports.
- Through cross organisation collaborations, develop central reporting to deliver robust and meaningful headcount reporting, produce data and narrative to feed into the Corporate Balance and build suite of quarterly balance sheet reports.
- Lead collation, understanding and delivery of Directorate and Finance Business Partner needs for any new reporting requirements with the Finance Systems Team.



### Ad-hoc

- To deliver process efficiencies enabling the role to spend more time analysing financial data to highlight trends, unexpected fluctuations, areas of overlap and make recommendations where appropriate.
- Support with a review of reporting across the organisation and assist with the implementation of any new systems or processes
- Support Finance Business Partners with the design, build and maintenance of costing models for changing or new activities.
- Support on delivering a cohesive and consistent Finance function across the organisation with a focus on excellent customer service.
- Along with the Finance Business Partners, coordinate Finance training for budgeting, reporting, purchase orders and other Finance processes.
- Work with the Programme Management Office to provide finance project management and reporting as required to ensure projects are delivered on time and on budget.
- Lead Finance Business Partners on team projects as required.
- Identify areas where benchmarking would be beneficial to the organisation, collect external data and make recommendations to improve performance, service delivery and efficiency.

### Other

- Develop effective and influential working relationships within Finance to support the Head of FP&A, Finance Business Partners and Directorate.
- Ensure all relevant policies, processes and procedures are documented, highlight where these are not being implemented effectively and make recommendations for improvements.
- 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 CFO.
- 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 Directorates supported.

### General

- To work in accordance with The Royal British Legion's shared values of **Service; Collaboration; Passion; Excellence; Valuing our people** which underpins the fundamental beliefs and qualities of who we are and what we do.
- 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 legislation, including reporting any health and safety hazard immediately you become aware of it.
- To work in accordance with the General Data Protection Regulations and Data Protection Act 2018.
- It is clear that due to the nature of the work of the Legion, the post holder may have access to material which is confidential. It is a condition of their contract of employment that they ensure that no confidential material is leaked from the department to unauthorised personnel.



- To implement the Equal Opportunities Policy into your daily activities. Royal British Legion is an equal opportunities employer and positively encourages applications from suitably qualified and eligible candidates regardless of sex, race, disability, age, sexual orientation, gender reassignment, religion or belief, marital status, or pregnancy and maternity. All employees are required to work in accordance with the Equality Act (2010).

This job description reflects the current scope of duties and responsibilities of the role. The post holder may be asked, and is expected, to undertake any other duties commensurate to the grade of the post. As duties and responsibilities change and develop, this job description will be reviewed and may be subject to amendment.



Consider if the criteria are essential, can training be provided or candidates upskilled.

### PERSON SPECIFICATION

CRITERIA	ESSENTIAL / DESIRABLE	HOW TO BE MEASURED
<b>QUALIFICATIONS</b>		
Educated to degree level or equivalent	D	Application
CCAB-recognised accountancy qualification	E	Application / certificate
<b>KNOWLEDGE &amp; EXPERIENCE</b>		
<p>Relevant and appropriate experience in finance and management accounting obtained in a complex organisation. This includes:</p> <ul style="list-style-type: none"> <li>• Variance reporting and investigation</li> <li>• Commercial support to user departments</li> <li>• Budgeting and forecasting</li> <li>• Develop management information reports to meet the needs of key stakeholders</li> <li>• Business analytics</li> <li>• Financial / cost modelling</li> </ul>	E	Application / Interview / Assessment
Experience of working in a commercial organisation.	D	Application / Interview
Able to demonstrate knowledge and / or experience of charity financial management and knowledge of charity accounting principles.	D	Application / Interview
Knowledge of Open Accounts or similar reporting systems and tools.	E	Application / Interview
Experience of contributing to organisational strategy through financial and corporate planning.	D	Application / Interview
<b>SHARED VALUES AND BEHAVIOURS</b>		
<p><b>Service</b> We support and serve. We are compassionate. We provide great customer care to all the people who come into contact with us. We are accountable and act with integrity.</p>		Interview



<p><b>Collaboration</b> We value working together and with partners to achieve shared goals. Through strong communication and support, we build trust with each other and treat everyone with respect and honesty.</p> <p><b>Passion</b> We are passionate about our role and contribution. With a positive outlook we are resilient and committed to our work.</p> <p><b>Excellence</b> We strive to be the best we can. We are effective and efficient. We are bold. We are open to new ideas and approaches, challenge each constructively and are willing to learn.</p> <p><b>Valuing our People</b> We support, encourage and provide opportunities for all our people – ensuring we recognise and value everyone’s contribution.</p>		<p>Interview</p> <p>Interview</p> <p>Interview</p> <p>Interview</p>
<b>SKILLS &amp; ATTRIBUTES</b>		
<p>Numerate with good attention to detail to ensure data integrity and accuracy.</p>	E	Assessment
<p>Able to perform accurate insightful analysis of complex financial data and communicate this clearly to finance and non-finance audiences.</p>	E	Application / Interview / Assessment
<p>Strong IT skills – competent user of MS Office and familiar with in-house database systems</p>	E	Application / Interview
<p>Empathy with mission and values of the Legion</p>	E	Interview