



**Job Title:** Senior Financial Planning Analyst

**Salary Range:** £47,000 to £57,000

**Reports to:** Head of Finance Business Partnering

**Location:** London

### **Who are we?**

Shaw Trust is a charity helping to transform the lives of young people and adults across the UK and internationally. Our specialist services help people gain an education, enter work, develop their career, improve their wellbeing or rebuild their lives. We add value to every service we deliver by investing back into the people and communities we support.

We are one of the largest 25 charities in the UK. We use our combined experience of over 75 years to support people to develop their potential. We have one goal: to help transform the lives of one million young people and adults each year by 2022.

Working with us gives you far more benefits than a standard package; it gives you the chance to help turn someone's life around.

### **What we need?**

We are looking for a dynamic and highly motivated individual to join our finance team. You will work closely with the finance business partners and operational leads to develop, implement and review commercial bids and acquisitions across the organisation. You will implement best practice from a modelling and due diligence perspective and advise on value drivers to inform the bidding strategy and financial outlook.

You will be an experienced finance professional with an ability to analyse data, identify trends and engage and influence a range of stakeholders consistently. You will be a strong relationship builder, both within the finance team and across the organisation. You will have a passion for quickly understanding and evaluating the value driver across a diverse range of contracts and sectors.

### **Are you right for the job?**

- Have you operated in a business development / transactions environment before?
- Do you have experience of performing financial and commercial due diligence?
- Have you built financial models to assess or value a new or existing opportunity?
- Do you enjoy working in a diverse organisation with exposure to multiple levels of management and senior stakeholders?
- Do you work well as part of a broader team and build strong relationships to achieve the best outcome?
- Are you experienced with advising senior leaders on financial risks and opportunities?

### **Main Duties and Responsibilities**

1. Deliver financial and commercial due diligence, analytics and modelling in support of the charity, with particular focus on new business development.
2. Implement best practice in modelling and business development processes across the group.
3. Be able to summarise and present complex opportunities and risks for senior management.
4. Build strong relationships across finance, operational and business development teams.
5. Assist as necessary the broader team in annual budgeting and long-term forecasting.
6. Perform additional analysis as required in support of the businesses to inform organisational strategy.
7. No direct reports but will be looked to for expertise from other members of the team and potential to grow the team once added value proved.

### **Other**

1. To undertake any further training as identified in the Shaw Trust review procedures.
2. Ensure that safe working practices are followed in respect of COSHH and other Risk Assessment control measures.
3. Employees must comply with the provisions of 'The Health and Safety at Work Act 1974' and must take reasonable care for the health and safety of themselves and of other persons who may be affected by their

acts of omissions whilst at work. Employees are also required to co-operate with their employer to enable them to perform or comply with any statutory provisions. The Trust's efforts to promote a safe and healthy working environment can only succeed with the full co-operation of its employees.

4. To understand, comply with and promote Shaw Trust's safeguarding policy and procedures. It is the responsibility of all employees to make the working environment safe and secure for all. Everyone must adhere to the 5 Rs in relation to possible abuse: Recognition, Response, Reporting, Recording and Referral. The Trust can only ensure its dedication to the protection of vulnerable people with the full cooperation of its employees.
5. The Trust has an Equality and Diversity Policy and it is the responsibility of all staff to comply with this. The key responsibilities for staff under this Policy are set out in the Trust Code of Conduct.
6. To maintain the confidentiality about clients, staff and other Trust business. The work is of a confidential nature and information gained must not be communicated to other persons except in the recognised course of duty. The post holder must meet the requirements of the Data Protection Act at all times.
7. To maintain awareness of risk and to take personal responsibility for ensuring that the Trust is not unnecessarily exposed to risk. To report any issues or concerns relating to risk and the effectiveness of the Trust's risk management arrangements.
8. Be aware of, promote and implement Shaw Trust's Risk, Quality and Information Security Management Systems.
9. To report to line manager, or other appropriate person, in the event of awareness of bad practice.
10. Recycle and manage energy within your environment.

## Person Specification

**Job Title:** Senior Finance Business Partner

(E = Essential D = Desirable)

<b>SKILLS AND CORE COMPETENCIES</b>
<b>Technical competency (qualifications and training)</b> <ul style="list-style-type: none"><li>• Qualified Accountant ACA, ACCA, CFA or CIMA or QBE <b>(E)</b>.</li></ul>
<b>Experience</b> <ul style="list-style-type: none"><li>• Experience of working in a transactions or due diligence role, either in professional services or as part of industry / in a business development team <b>(E)</b>.</li><li>• 1 – 3 years relevant post qualification experience <b>(E)</b>.</li><li>• Experience of working across a wide variety of contracts <b>(E)</b>.</li><li>• Experience of the not-for-profit sector <b>(D)</b>.</li><li>• Experience working with multiple stakeholders in a due diligence process / transaction <b>(E)</b>.</li><li>• Experience of working in a matrix management structure <b>(D)</b>.</li><li>• Forward financial planning, costing, and option appraisal <b>(E)</b>.</li><li>• Experience of operating across a range of finance functions, such as financial services, budgeting, planning, reporting, capital accounting, and supporting budget holders <b>(D)</b>.</li></ul>
<b>Skills and Attributes</b> <ul style="list-style-type: none"><li>• A good working knowledge of all Microsoft applications, with advanced Excel skills (VBA not required) <b>(E)</b>.</li><li>• Ability to support a team, encouraging cross-learning and consistent service delivery <b>(D)</b>.</li><li>• Ability both to identify required process improvements and to design and implement those improvements <b>(D)</b>.</li><li>• Sift complex financial and non-financial information from a range of available sources to understand its impact on the organisation <b>(E)</b>.</li><li>• Understand and work through complex issues and identify solutions <b>(E)</b>.</li><li>• Work under pressure, meet key deadlines and adapt to a changing environment <b>(E)</b>.</li><li>• Work effectively as part of a team <b>(E)</b>.</li><li>• Work without supervision and achieve the objectives of the post <b>(E)</b>.</li><li>• Identify and prioritise complex, time sensitive workload and projects <b>(E)</b>.</li><li>• Motivate a professional team <b>(E)</b>.</li></ul>
<b>Personal qualities, communicating and relating to others</b> <ul style="list-style-type: none"><li>• Excellent communications skills, both orally and in writing <b>(E)</b>.</li><li>• Commitment to customer service <b>(E)</b>.</li><li>• Strong persuasion and negotiation skills <b>(E)</b>.</li><li>• Willingness to act as an ambassador for the finance department <b>(E)</b>.</li><li>• Commitment to personal &amp; professional development <b>(E)</b>.</li></ul>

- A corporate team player – able to focus on the good of the broader organisation, and the clients we serve **(E)**.
- Build effective working relationships with colleagues across the Trust **(E)**.
- Demonstrate effective negotiating and influencing skills **(E)**.

#### **Safeguarding**

- Be able to display an awareness, understanding and commitment to the protection and safeguarding of young people and vulnerable adults **(E)**.
- This post requires a disclosure and barring service check at the Basic Level **(E)**.

#### **Other**

- Have an understanding of and be able to demonstrate a commitment to Equal Opportunities and Diversity **(E)**.
- A desire to work within the Charity Sector **(D)**.
- Willingness to travel as necessary **(E)**.