

Job Description

Job Title:	Financial Analyst
Reports to:	Senior Financial Planning Analyst
Grade Band :	C0073 (£49,169 – £60,095)
Location:	Nationally

Purpose

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 practices from a modelling and due diligence perspective and advise senior leadership on value drivers to inform the bidding strategy and financial outlook.

You will be a finance, data analytics, or financial modelling professional with the ability to analyse data, identify trends and engage and influence a range of stakeholders consistently. You will be a strong relationship builder 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.

Main Duties and Responsibilities

- Deliver financial and commercial due diligence, analytics, and modelling in support of the charity, with a particular focus on new business development.
- Implement best practices in modelling and business development processes across the group.
- Be able to summarise and present complex opportunities and risks for senior management.
- Be dedicated to professional development. This is in terms of keeping up to date with the latest financial modelling techniques and developments, pursuing further qualifications, and seeking to improve the team knowledge bank consistently and continuously.
- Build strong relationships across finance, operational and business development teams.
- Assist as necessary the broader team in annual budgeting and long-term forecasting.
- Perform additional analysis as required in support of the businesses to inform organisational strategy.
- Supporting the Senior Financial Planning Analyst and business leaders in developing and implementing their strategy.

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 a Diversity and Inclusion 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 in line with Shaw Trust's Strategic aim to adopt green approaches and become carbon neutral.

This job description is intended to provide a broad outline of the main duties and responsibilities only. The post holder will need to be flexible in developing the role in conjunction with the line manager. The post holder may be asked to carry out any other delegated duty or task that is in line with their post.

<p>Person Specification</p> <p>Job Title: Manager & Functional Expert</p> <p>(E=Essential D=Desirable)</p>
<p>SKILLS AND CORE COMPETENCIES</p>
<p>Technical competency (qualifications and training)</p> <ul style="list-style-type: none"> • Qualified or Part-Qualified Accountant CIMA, ACA, ACCA, CFA, or Equivalent such as a well-trained Financial Modeller or Data Analyst (FMVA, BIDA etc.). (E). • Professional training or QBE in financial modelling (E)
<p>Experience</p> <ul style="list-style-type: none"> • Experience of working in a transactions, bids and deals environment, technical financial modelling, or due diligence role, either in professional services or as part of an industry / in a business development team. (E). • Experience in financial modelling of large-scale contracts, pricing schedules, business cases, and client outputs (E). • Experience working across a wide variety of contracts (E). • Experience working with multiple stakeholders in a due diligence process/transaction (E). • Forward financial planning, costing, and option appraisal (E). • 1 – 3 years relevant post-qualification experience or equivalent (D). • Experience in operating across a range of finance functions, such as financial services, budgeting, planning, reporting, capital accounting, and supporting budget holders (D). • Experience working with Agresso BusinessWorld, ERP systems, and FP&A tools such as Anaplan a bonus but not essential at all .

Skills and Attributes

- A good working knowledge of all Microsoft applications, with advanced Excel skills at minimum (VBA not essential). An exceptional skill as a technical financial modeller is advantageous. **(E)**.
- Ability to meet deadlines, manage project milestones, and provide effective financial controllership and analysis within bidding and tendering timelines **(E)**.
- Strong stakeholder and upward management skills. The ability to communicate effectively and efficiently is a must **(E)**.
- Ability to balance technical financial modelling and detail with sharp commercial acumen to produce accurate investment appraisals **(E)**.
- Ability to support a team, encouraging cross-learning and consistent service delivery **(D)**.
- Ability both to identify required process improvements and to design and implement those improvements **(D)**.
- Sift complex financial and non-financial information from a range of available sources to understand its impact on the organisation **(E)**.
- Understand and work through complex issues and identify solutions **(E)**.
- Work under pressure, meet key deadlines and adapt to a changing environment **(E)**.
- Work effectively as part of a team and preserve strong stakeholder relationships **(E)**.
- Identify and prioritise complex, time-sensitive workloads and projects **(E)**.

Personal qualities, communicating and relating to others

- Excellent communication skills, both orally and in writing **(E)**.
- Commitment to customer service **(E)**.
- Commitment to personal & professional development **(E)**.
- 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)**.
- Strong persuasion and negotiation skills **(D)**.
- Demonstrate effective negotiating and influencing skills **(D)**.

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 a Basic level. **(E)**

Other

- Understand and be able to demonstrate a commitment to Equal Opportunities and Diversity.
- Ability to travel on behalf of the Trust as required.
- Good understanding of disability issues .
- Willingness to undertake travel throughout the UK, including occasional overnight stays.