

JOB DESCRIPTION

Job Title:	Financial Planning & Reporting Manager
Service / Department:	Finance
Reports To:	Head of Finance
Responsible For:	Finance Officers
DBS Check:	Basic

Job Purpose:

At Salvation Army Homes, we are dedicated to providing comprehensive, good quality housing services, support and resettlement. In this role, you will be directly contributing to the increase in the number of homes we can provide to residents to help achieve our mission of Transforming Lives.

The Finance Planning and Reporting Manager will inspire and lead the reporting team through with the production of management and statutory accounts, budgets, forecasting, long term financial planning and business partnering across the organisation.

The Financial Planning and Reporting Manager will create efficiency through process reengineering and improved reporting methods. They will promote continuous improvement across the planning and reporting function and build strong relationships with senior business leaders across the organisation.

Main Duties and Responsibilities:

- Act as the Finance Business Partner for designated service areas, developing strong relationships with directors, managers and budget holders across the organisation.
- Lead the production of accurate monthly management accounts, annual budgets, monthly and quarterly forecasts, and financial performance reports in line with agreed timetables.
- Undertake detailed analysis of financial transactions across all service areas, ensuring transactions are accurately recorded, coded and reported.
- Review income, expenditure, journals, accruals, prepayments and balance sheet transactions, investigating variances and resolving issues in a timely manner.
- Produce insightful variance analysis, trend reporting and financial commentary to support operational and strategic decision making.
- Develop a thorough understanding of business performance, identifying key drivers, risks and opportunities, and providing actionable recommendations to budget holders and senior management.
- Lead regular budget review meetings with managers, providing challenge, support and guidance to improve financial performance and accountability.
- Deliver a high-quality finance business partnering service, taking a proactive and forward-looking approach to support business objectives and operational delivery.

- Carry out analytical reviews of financial and operational data, identifying risks, inefficiencies and opportunities for improvement, and supporting managers to develop practical solutions.
- Lead the preparation and review of accurate balance sheet reconciliations, ensuring all control accounts are supported and reconciled within agreed deadlines.
- Support the preparation of annual statutory accounts and year-end reporting requirements.
- Monitor capital and revenue expenditure, ensuring compliance with accounting standards, financial regulations and organisational policies.
- Ensure management information is accurate, timely and relevant to support effective performance management across the organisation.
- Build and maintain strong working relationships across Finance and operational teams, promoting collaboration and continuous improvement.
- Provide financial training and support to budget holders to improve financial awareness and strengthen ownership of budgets.
- Support colleagues across the Finance team, providing cover and assistance for other Finance Business Partners where required.
- Contribute to the successful delivery of internal and external audits, implementing recommendations and improving control processes where necessary.
- Demonstrate professionalism and contribute to raising the profile and reputation of the Finance team across the organisation.

Related Activities:

- Have a good understanding of the work of Salvation Army Homes and an empathy with its mission
- Foster an environment for growing skills within the team and organisation
- Provide an excellent level of customer care both within Salvation Army Homes and for residents, the general public and external bodies
- Effective leadership for finance officers and able to motivate and develop the team
- Implement Salvation Army Homes' Health and Safety Policy and Procedures as appropriate for the role and with an awareness of your responsibilities. Ensure that all practices are undertaken in accordance with ensuring a healthy and safe working environment
- Lead by example in promoting non-discriminatory behaviour to ensure an equality of opportunity for all. Promote diversity as making good business sense and work in an inclusive manner
- Proactively manage team and embed best practice working environment, either when working remotely or in office
- Participate in essential training, role related training and to work in accordance with all relevant Salvation Army Homes' regulations including, for example the Code of Conduct,

Equality, Diversity and Inclusion, Safeguarding, Health and Safety and Information Security

- Fulfil the role by being adaptable and flexible to the overall activity that is necessary to be successful and effective
- Fully align with Salvation Army Homes values and behaviours and to adopt an 'advantaged thinking' perspective through language, conduct and behaviour

PERSON SPECIFICATION

Essential Qualifications and Memberships:

- Professional Accounting Qualification (e.g. ACCA, CIMA, ICAEW) or qualified by experience

Aptitudes and Abilities:

Essential

- Passionate about the Association's mission and reflects its culture and values
- Proactively demonstrates a strong commitment to equality and diversity and works in a manner that is inclusive
- Industrious, shows initiative and is innovative
- Open to learning and development and fosters a learning culture
- Strong commitment to satisfying both internal customer and other stakeholder needs whilst ensuring the Association delivers a cost-effective Finance service that adds value.
- Strong commitment to continual service improvement
- Effective oral and written communication skills with service users and peers, with the ability to produce and present information in clearly defined and understandable formats for all levels of staff
- Computer literate and advanced level Excel and competent user of MS Office 365 software including SharePoint, Teams, Word, PowerPoint
- Skilled at recognising talent, bringing people together to generate a strong team spirit and encouraging collaborative working
- Good business acumen and commercially minded
- Good time management with an ability to manage own and others time
- Prepared to travel to regional offices and sites around the country
- Ability to work outside normal working hours in accordance with the needs of the business, including occasional attendance at evening and weekend meetings.
- Able to understand the needs, objectives and constraints of those in other disciplines and functions
- Strong interpersonal skills with an ability to liaise effectively with a wide range of stakeholders
- Able to influence others through persuasive discussion and report writing
- Agile and responsive to change, particularly in an evolving and challenging environment

Experience and Interests:

Essential

- Experience of Finance Business Partnering or cross team working
- High skilled at interpreting financial information and spotting trends
- Adept at providing management information to support decision making
- Previous experience of implementing new systems or processes

Desirable

- Experience of working in the Social Housing Sector within a Finance environment
- Experience of preparation of Financial Statements

Values and Behaviours:

To be successful in this job you need to be fully aligned with our values and behaviours, along with working as part of #OneTeam, helping Salvation Army Homes achieve our mission. Our values and behaviours mean a lot to us. They help define how we should all work, what we're here for and this helps us to stand out from other providers and employers.

S	Servant Leadership — we help people thrive	Have we given our audience everything they need to succeed in their next step?
P	Passion — we love our work	Have we spoken boldly and with confidence? Have we spoken out rather than stayed silent?
I	Inclusion — this is a team effort	Have we kept our communication simple and to the point? Have we used clear, accessible English?
R	Respect — we show respect for all	Have we given our audience credit for their intelligence? Have we advocated for our residents?
E	Empowerment — we have trust	Have we given the right context to our message? Has our communication been story-driven?