

Financial Analysis Specialist



The purpose of this position

The **purpose** of the position is to support CFO and Manager of Finance Business Partners to provide high quality financial modelling, reporting and analysis to the CFO and functional stakeholders. The role will develop analytics to draw insights and develop financial modelling to assist with forecasts and decision makings.

About the position

- This position is within National Office. It is part of the Finance team.
- ☒ This position reports to the Manager of Finance Business Partners
- ☐ Reporting line may vary depending on location and service size
- ☒ This position does not have any direct reports ☐ This position may have direct reports, positions vary
- ☐ This position has the following direct reports:
- This position is designated Band 5 under the *Schedule of Authorities and Delegations*
- ☐ This position is a budget holder ☐ This position has designated revenue targets
- The position is a Team Specialist level of the Capability Framework.

Key areas of responsibility

- An understanding of The Benevolent Society's services, operating environment, and financial priorities by maintaining close connection with Direct Manager and proactively partnering with key stakeholders in the assigned areas.
- Develop financial models for tenders, performance projection, and merger and acquisition projects
- Build KPI reports with cross functional teams including user-friendly dashboards using Power BI.
- Work with relevant teams to mine data out of existing systems to develop drill down analysis for insights
- Support Direct Manager in finance projects, such as management reporting enhancement in terms of analysis
- Support the Finance team in regular Finance cycles such as, forecast and budget processes.
- Identify performance improvement and de-risk opportunities and develop the necessary course of actions with key stakeholders.
- Provide advice, learning and coaching to internal clients to enhance understanding of financial insights and scenarios, and proactively find ways to support them to achieve their business plans.
- Assist with any other tasks assigned, which may include (but not limited to) those related audits, acquittal and funder reporting, benchmarking data collection and interpretation.

Capability Framework

The Capability Framework defines the essential knowledge, skills, behaviours and attributes individuals need to success in their roles. It provides the organisation with a shared language and clear expectations across all levels of the organisation. The Capability Framework can be accessed [here](#) internal document only.

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Key outcomes

When things are going well, we would expect to see these outcomes:

- Key decision making will be backed by sound, timely and accurate financial analysis, modelling and support
- Management will have excellent timely visibility of the programs' and/or functions' financial performance and key indicators
- Excellent visibility and understanding of key Finance CRM and Client Data Management system affecting finance processes
- Strong relationships with Finance Team, budget holders, and senior management

Key Capabilities

- Qualified CIMA/CA/CPA
- Extensive years' experience in Management Accounting, Financial Analysis and Business Partnering experience
- Strong system skills
- Demonstrated financial modelling capability
- Experience in building and using reports in Power BI
- Experience in the human/Not for Profit services sector is preferred
- Proven ability to successfully build and manage relationships
- Strong communication, clearly articulating ideas to achieve and drive business decision making process
- Collaborate, cross-functional and flexible work style
- Excellent time management, planning and organisational skills; competent at juggling workload and priorities
- A proactive, can-do approach with an ability to drive initiatives through to completion
- Strong customer service focus with the ability to understand the business to create a better experience
- System implementation experience is not essential but would support success

People who know this position say that

People who know this position say the things that might make your day are:

- Forward-looking, collaborative and supportive.
- A strategic partner with budget holders and a provider of accurate financial and operational information upon which appropriate, proactive decisions can be made.
- Being part of a rapidly growing, highly ambitious organisation with the ability to directly contribute to growing its reach and impact.

People who know this position say some key challenges you might experience are:

- Managing stakeholder expectations and differing levels of understanding about Finance
- Pace and scope of change within the business and in the sector generally

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- Multi-tasking to meet deadlines of important deliverables

Work and flexibility

While The Benevolent Society has great tools to connect us remotely, sometimes we will need to connect in person. This means we need to travel on occasion.

This position may require:

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| ☐ Overnight travel/stays | ☒ Weekend work |
| ☒ Travel between office locations/regions | ☒ Evening work |
| ☐ Travel to clients (varied locations) | ☒ Special event support |
| ☐ Use of own registered, insured (comprehensive) motor vehicle | |
| ☒ Use of TBS pool cars | |

Key relationships

We work collaboratively with others. This position works closely with:

Within The Benevolent Society:

- Finance team
- Operations budget holders
- Senior Leadership team
- Business Development Team

Outside The Benevolent Society:

- Benchmarking consultants