



# Financial Planning and Reporting Manager

## Job description and person specification

Accountable to: Head of Financial Planning and Analysis

### Purpose of the role

Reporting directly to Head of Financial Planning and Analysis, the role will play a key role in financial planning and analysis across the business, along with our key budgeting and forecasting processes. They will also support the Budgeting and costing manager in maintaining the Infor BI budget model and excel based cost/price templates, along with training regional finance colleagues ensuring they fully understand the budget assumptions and process. The post holder will be expected to develop KPIs and improve processes in conversation with others.

### Core duties

- Perform ad hoc analysis and coordinate with teams and implement financial systems.
- Responsible for supporting and analysing yearly budgeting and monthly forecasts
- Driving continuous process improvement
- Supporting of the business in preparation and determination of business goals and strategies.
- Coordinate with regions and make recommendations to enhance financial support to all plans
- Analysing costs by studying historical data, identifying trends in expenses, and recommending cost reduction strategies
- Working with other departments to identify opportunities for increasing efficiency or improving workflow processes within the organisation
- Support all company costings and tenders alongside business development, to

include regular reviews to ensure we are meeting the companies changing environment.

- Analyse Regional budget submissions based on trends, historical data, and comparative information provide data-driven insights to senior management
- Ensure productivity targets are met
- Undertake periodic review of contract profitability and liaise with RFM's to understand issues around viability. Reflect any changes in the costing model and budget assumptions for the next year.

### Please note:

This job description is not exhaustive and reflects the type and range of tasks, responsibilities and outcomes associated with the role.

In additional to the above you are expected to:

- Undertake other duties from time to time as required by your manager or Head of Department / Director.
- Maintain confidentiality in accordance with our data protection policy and procedure.
- Work on an agile basis between your home and the Company's offices and/or any other locations as is reasonably required

### Person specification

Please use this in conjunction with the advertised requirements. The final column indicates how we will tell if you have provided evidence of the required criteria. Criteria considered from the application form will be marked Shortlisting, those reviewed when we meet you will be marked Interview and those considered via assessment at interview will be marked Test.

Qualifications		
Qualified Accountant - ACCA/CIMA or equivalent	Desirable	Shortlisting/ Interview

Experience		
Experience of working in a rapidly changing environment	Essential	Shortlisting/ Interview
Experience in proposing, justifying, initiating and implementing change	Essential	Shortlisting/ Interview
Experience of working in a Commercial finance role	Essential	Shortlisting/ Interview

Skills		
Strong negotiation skills	Essential	Shortlisting/ Interview
Apply analytical skills beyond the traditional functions of finance	Essential	Shortlisting/ Interview
Strong system skills, with a logical and methodical approach	Essential	Shortlisting/ Interview
Able to analysis data and make positive Recommendations	Essential	Shortlisting/ Interview
Exercise confidentiality when dealing with individuals’ personal details and information	Essential	Shortlisting/ Interview
Experience of using Open Accounts.	Desirable	Shortlisting/ Interview
Experience of managing people.	Desirable	Shortlisting/ Interview
Strategic thinking – evidence of having contributed towards tactical/strategic decision making and the ability to see the wider picture	Essential	Interview

Knowledge and understanding		
An understanding of the income streams and construction of budgets for Care Services	Essential	Shorting/ Interview
The ability to communicate effectively (both written and verbal) at all levels, internal and external to the organization. Building effective relationships with Finance & Operations staff.	Essential	Shortlisting/ Interview
Strong inter-personal skills	Essential	Shortlisting/ Interview
Demonstrate an understanding of Dimensions core values	Essential	Shortlisting/ Interview
Good (Intermediate level) Microsoft Excel knowledge, with the ability to use other Microsoft packages.	Essential	Shortlisting/ Interview

Attributes		
Demonstrate commitment to equality, diversity, inclusion and the values of Dimensions. Demonstrates fairness and consistency	Essential	Interview
Be a reliable, supportive and professional role model.	Essential	Interview
To work flexibly according to the requirements of the role and the organisation	Essential	Interview
Ability to develop positive working Relationships	Essential	Interview
Shows integrity, sensitivity, and respect for others	Essential	Interview
Demonstrate commitment to own personal Development	Essential	Interview