



Head of Financial Business Partnering

Directorate: Support Services

Location: Hybrid working from a WWT site

Reporting to: Head of Finance

Grade: 11

Main function of post: The emphasis of this role is supporting colleagues in financial thinking for projects and other activities. It is forward looking, providing forecast and modelling of future activities. Key for this role is to ensure that useful and timely information is provided to relevant programme and project managers enabling good decision making.

Supervisory responsibilities: Line management of the financial business partnering team.

Responsibilities of the post

1. To be a finance business partner with a strong customer service focus, building effective and collaborative relationships with budget holders across the WWT group and provide support and information to enable good decision-making and the best results in terms of charitable and financial outcomes. This will involve regular meetings with managers across the organisation.
2. To partner with managers across WWT, helping with queries, improving their understanding of their management accounts, providing training and ensure that financial rules and procedures are followed.
3. To lead on the production of accurate, concise and easy to understand management accounts each month, including a monthly Finance Report for the senior management team and trustees, in line with agreed timescales and procedures.
4. Oversee the management of the charity's restricted fund accounts to ensure all funds are accurately accounted for and properly utilised in accordance with donor wishes and financial directives, which will involve:
 - a. Ensuring the VAT treatment of the project income & expenditure is correct and fully documented
 - b. Reviewing funding agreements for compliance requirements
 - c. Maintaining an up-to-date record of the charity's restricted funds

d. Helping colleagues make best use of restricted funds, including consideration of offsetting of unrestricted funds

5. Lead on the compilation of accurate, detailed, budgets (revenue and capital, restricted and unrestricted) in line with agreed timescales. This work to include liaison with budget holders throughout the charity.
6. Oversee the management of the organisation's Project Register, including the set up within the accounting system and maintenance of the relevant reports to enable timely reporting on all projects.
7. Develop reports, working with budget holders and managers as needed, for all WWT activities to support decision making at all levels of the organisation.
8. Lead the compilation of accurate year-end forecasts at agreed intervals during the year. This work to include liaison with budget holders throughout the charity.
9. Support the production of year-end accounts and audit schedules to the required standard and timescales ensuring that all financial documentation is filed so that there is a clear audit trail and documents are easily retrievable.
10. Where required, assist managers throughout the charity with the compilation of finance plans, business cases and external grant applications – for both commercial contracts and charitable projects.
11. Follow all relevant internal controls operating within the Finance department.
12. Ensure that all financial documentation relating to the work above is filed in a timely manner so that there is a clear audit trail and documents are easily retrievable.
13. To provide leadership to all staff within the team, enabling every team member's contribution to be maximised by ensuring that the appropriate levels of direction, support and challenge are provided through professional line management in line with WWT's people frameworks.
14. Design, implement and monitor team key performance indicators to ensure full delivery of team priorities.
15. To ensure the health, safety and wellbeing of everyone in your team is an integral part of how they work, creating a safe environment for staff, volunteers and visitors by implementing WWT's health and safety policies and guidelines.
16. To be responsible for ensuring that your team engage with the WWT Sustainability Statement being aware of negative environmental impacts and incorporating sustainable ways of working within your team.

In addition to the duties and responsibilities listed, the post holder is required to perform any other reasonable duties that may be assigned by the supervisor shown above, from time to time.

Date raised: December 2018

Amended: June 2022

Person Specification

1. Qualifications

Essential:

- Fully qualified in a professional accounting qualification (CIMA/ACA/ACCA/CIPFA).

2. Experience

Essential:

- Management accounting experience that encompasses a variety of work, including the production of management accounts, development of reports to support effective decision making, budgeting and forecasting.
- Experience supporting commercial operations.
- Understand broader organisational strategies and issues.
- Experience with interpretation of complex financial data.
- Strong technical skills, including spreadsheets (Microsoft Excel), financial software and report writing.
- Awareness of charity accounting.

Desirable:

- Experience of supporting and accounting for international operations and projects.
- Experience of managing grant funding financial requirements.
- Experience of Open Accounts financial software, including the writing of new reports.
- Significant experience in a management accounting role within a medium or large-sized charity.

3. Managerial & Supervisory

Essential:

- Ability to allocate work and define priorities for your team, carry out appraisals and give constructive feedback at regular catch-ups.
- Ability to effectively train and coach colleagues, both within the Finance Team and across the wider organisation.
- Ability to support colleagues by solving complex technical problems, of an accounting and IT nature.

Type of staff	Number managed	Number supervised
Employed Staff	3	6
Volunteers / Casual Workers	0	1
Contractors	0	0

4. Responsibility

Essential:

- Responsible for leading on the development and production of accurate management accounts, including reporting, to support effective decision making.
- Responsible for ensuring that the charity's restricted funds are accurately accounted for.
- Responsible for providing a high degree of customer service to colleagues and volunteers across the organisation.
- Required to work in a highly organised manner with excellent attention to detail.

Levels of responsibility:

Type of Responsibility	Level (£'s)
Expenditure (exc. payroll)	£1,000 authorisation limit Advising on expenditure relating to projects of £500,000 +
Cash Handling / Income	£15,000 Safe Providing expertise and advice on projects of £500k +
Assets (required for job, exc. buildings)	£1,000 (PC, F&F)
Visitors (per annum)	n/a

5. Creative Ability

Essential:

- Ability to think creatively when problem solving with complex accounting and systems issues.
- Ability to respond to the need for change e.g. new reporting requirements for restricted funds, editing report output.
- Ability to innovate, develop new initiatives and champion these across the organisation.
- Ability to undertake a broad range of tasks e.g. producing financial reports, meeting with budget holders, and prioritise competing demands.

6. Contact

Essential:

- Proven people / influencing skills to negotiate and persuade colleagues from across the charity, including senior managers and directors.
- The ability, when required, to effectively enforce rules and procedures in a supportive manner.

- The ability to communicate effectively in formal written reports, informal internal documents (such as on WWT's intranet), in formal presentations and in informal verbal situations.
 - The candidate must also have the ability to present a case and positively influence internal teams and external agencies, often with complex messages to convey.
 - The ability to provide informal training and explanations for finance and non-finance staff at all levels on basic, and more complex, financial subjects
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General Notes

Whilst this post is based at a WWT Wetland Centre, some travel may be necessary therefore a willingness to travel to other WWT Wetland Centres is essential.