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# Job Description

**Senior Finance Business Partner**

**Directorate:** Support Services **Location:** WWT Slimbridge Wetland Centre

**Reporting to:** Head of Finance **Grade:** 10

**Main function of post:** To enable good decision making by being forward looking, providing forecast and modelling of future activities, ensuring that useful and timely information is provided to relevant programme and project managers.

**Supervisory responsibilities**: No direct line management, but as a senior member of the team some supervision of others’ work will be required.

**Hours worked:** Normal working hours will be 37.5 hours a week. In addition to normal hours of work, this role is required to work those hours necessary to fulfil the requirements of the position to the satisfaction of the Trust.

**Working pattern:** Monday to Friday, 9.00am – 5.30pm with an hour for lunch.

## Main duties of the post

1. To be a Finance Business Partner with 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. This will involve regular meetings with managers across the organisation.
2. To partner with managers across WWT to understand and comply with finance procedures, helping with queries, improving their understanding of their management accounts, ensuring that financial rules and procedures are followed and to provide training.

1. 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:
	1. Ensuring the VAT treatment of the project income & expenditure is correct and fully documented
	2. Reviewing funding agreements for compliance requirements
	3. Maintaining an up-to-date records of the charity’s restricted funds
2. Provide year-end analysis and audit schedules to the required standard and timescales.
3. Working with the Finance Manager, to ensure a good management accounts service is provided across the charity.
4. Assist the Head of Finance with the compilation of accurate, detailed, annual budgets (revenue and capital, restricted and unrestricted) in line with agreed timescales. This work to include liaison with budget holders throughout the charity.
5. Assist the Head of Finance with the compilation of accurate year-end forecasts at agreed intervals during the year. This work to include liaison with budget holders throughout the charity.
6. Assist with 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.
7. Where required, assist managers throughout the charity with the compilation of finance plans, business cases and external grant applications.
8. Follow all relevant internal controls operating within the Finance department.
9. 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.

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

## Person Specification

### 1. Qualifications

#### Essential:

* Fully qualified in a professional accounting qualification (CIMA/ACA/ACCA/CIPFA) or qualified by experience.

### 2. Experience

#### Essential:

* Management accounting experience that encompasses a variety of work, including the production of management accounts, budgeting and forecasting.
* Experienced in the interpretation of complex financial data.
* Experience in and good knowledge of spreadsheets (Microsoft Excel).
* Experience in and good knowledge of finance software.
* An awareness of the requirements of charity accounting.

#### Desirable:

* Experience of working with Microsoft Dynamics GP and Management Reporter software, including the writing of new reports.
* Significant experience in a management accounting role within a medium-sized charity.

### 3. Managerial & Supervisory

#### Essential:

* Ability to allocate some work and help check others’ work, including that of those with no financial expertise.
* Ability to effectively train and coach staff, both within the Finance Team and across the wider organisation.
* Ability to help staff by solving complex technical problems of an accounting and IT nature.

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| **Type of staff** | **Number managed** | **Number supervised** |
| Employed Staff | 0 | 5 |
| Volunteers / Casual Workers | 0 | 1 |
| Contractors | 0 | 0 |

### 4. Responsibility

#### Essential:

* Responsible for producing accurate management accounts, with little supervision.
* Responsible for ensuring that the charity’s restricted funds are accurately accounted for.
* Responsible for providing a high degree of customer service to staff and volunteers across the organisation.
* Required to work in a highly organised manner with excellent attention to detail.

*Levels of responsibility:*

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| --- | --- |
|  **Type of Responsibility** | **Level (£’s)** |
| Expenditure (exc. payroll) | £750 authorisation limit |
| Cash Handling | £15,000 Safe |
| 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 undertake a broad range of tasks e.g. producing financial reports, meeting with budget holders.
* Ability to respond to the need for change e.g. new reporting requirements for restricted funds, editing report output.
* Ability to understand broader organisational strategies and issues.

### 6. Contact

#### Essential:

* The candidate must have the confidence to:
	+ enforce rules with more senior members of staff, whilst remaining pleasant, professional and helpful at all times.
	+ meet with staff at all levels to business partner with them and influence if necessary.
	+ deal professionally with external agencies e.g. auditors, software support.
* 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

#### Desirable:

* The ability to provide formal training presentations / workshops for non-finance staff at all levels on basic, and more complex, financial subjects.

## General Notes

Whilst this post is based at WWT Slimbridge, some travel may be necessary therefore a current driving licence is essential as is willingness to travel to other WWT Wetland Centres.