



## ROLE PROFILE

<b>Job Title:</b> Financial Planning & Analysis (FP&A) Analyst	<b>Role Reports to:</b> Head of Accounting	<b>Business Function:</b> Finance	<b>Grade:</b> E
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<b>Job Purpose:</b>  Provide financial planning and analysis insights to support the Commercial Finance Managers, Head of Accounting and wider business stakeholders in ensuring Your Housing Group maintains a robust and challenging business plan, including budgets and forecasts, which are closely aligned to business strategy.	<b>Key Competencies:</b> <ul style="list-style-type: none"><li>• Flexibility &amp; Resilience</li><li>• Meeting Customer Needs</li><li>• Interpersonal Understanding</li><li>• Impact &amp; Influence</li><li>• Personal Learning &amp; Growth</li><li>• Building Relationships</li><li>• Gathering / Seeking Information</li><li>• Future Focus</li><li>• Innovation</li><li>• Problem Solving &amp; Decision making</li></ul>
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### **Key Responsibilities:**

- 1.** Designing and running the Group budgeting and forecasting process, whilst ensuring they remain robust, challenging and closely aligned to both business strategy and longer-term business planning.
- 2.** Responsible for the maintenance and development of the Groups 10 year business plan model, which helps inform our 30 year financial plan and forms the basis of our shorter term budget and forecasting process – including scenario and sensitivity analysis.
- 3.** Support the wider Accounting teams and Commercial Finance in understanding current business performance and impact on future performance through:
  - a. Assisting in the devising and reporting on monthly KPIs
  - b. Assist in preparing analytical insights for Executive Team and Board into the drivers of budgeted costs/revenue and variances to actuals
- 4.** Assist in the refining and enhancing of business processes and systems to ensure better provision of management information to aid decision making.
- 5.** Support the Commercial Finance Manager for Transformation in the quantification of proposed benefits of change.
- 6.** Act as the Finance Teams centre of excellence for building and maintaining Excel based modelling techniques
- 7.** Maintain the consolidated financial risks and opportunities schedule through consultation with the wider finance team
- 8.** Assist with both internal and external reporting processes, including regulatory and statutory returns, as required.
- 9.** Support on projects as directed by the Head of Accounting and wider Finance Senior Management team.
- 10.** Undertake additional duties appropriate to the role and/or grade.

	Essential	Desirable
<b>Knowledge</b>	<ul style="list-style-type: none"> <li>• Good working knowledge of finance processes including both transactions and month end reporting.</li> <li>• Knowledge of latest Accounting Standards</li> <li>• Understanding of best practice and financial control</li> </ul>	
<b>Skills</b>	<ul style="list-style-type: none"> <li>• Advanced excel skills, with strong reporting skills and the ability to manipulate large data sets</li> <li>• Commercially minded with excellent technical &amp; analytical skills</li> <li>• Ability to articulate and present complex information to both financial and non-financial stakeholders</li> <li>• Intermediate Microsoft PowerPoint skills</li> <li>• Highly developed verbal and written communication skills.</li> <li>• Excellent accuracy and attention to detail</li> <li>• An inquisitive and challenging mindset</li> <li>• Highly numerate and with strong problem-solving skills</li> </ul>	<ul style="list-style-type: none"> <li>• Understanding of VBA/SQL</li> </ul>

	Essential	Desirable
Experience	<ul style="list-style-type: none"><li>• Prior experience of working as an FP&amp;A Analyst</li><li>• Designing and implementation of a Group-wide budget and/or forecasting process based in Excel.</li></ul>	<ul style="list-style-type: none"><li>• Experience of working in the finance department of a plc or PE backed business</li><li>• Experience of working to the FAST (Flexible, Approachable, Structured, Transparent) standard of financial modelling</li></ul>
Qualifications/Education	<ul style="list-style-type: none"><li>• Fully qualified member of a recognised accounting body (i.e. ACA (Association of Chartered Accountants), ACCA (Association of Chartered Certified Accountants), CIMA (Chartered Institute of Management Accountants), CIPFA (Chartered Institute of Public Finance and Accountancy)</li></ul>	<ul style="list-style-type: none"><li>• Degree level qualification</li></ul>
People Management Responsibility?	No line management responsibility.	
Budgetary Responsibility?	No budgetary responsibility	
Key Relationships (internal/external)	Financial Control Team colleagues, Commercial Finance Managers, Transactional Teams and external advisors.	
<b>Safeguarding of Children Young people and Vulnerable Adults</b> Your Housing Group is committed to safeguarding and promoting the welfare of children, young people and vulnerable adults and expects all staff to share this commitment. As a Your Housing Group employee, it is your responsibility to attend safeguarding training in accordance with YHG safeguarding training strategy and to be aware of and work in accordance with the YHG safeguarding policies and procedures and to raise any concerns relating to such procedures which may be noted during the course of duty.		



<b>Key Role Performance Indicators</b>
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| <ol style="list-style-type: none"><li>1. Effective project management of the budgeting and forecasting processes and timetables.</li><li>2. Effective oversight, management and continued development of the budgeting, forecasting, business planning and modelling tools</li><li>3. Solid understanding of the company's historical performance and the key assumptions and trends that may impact future performance.</li><li>4. Satisfactory maintenance and development of the Group's 10-year business plan model, ensuring alignment to the Group's strategic plan</li><li>5. Development of financial models and analysis to support strategic initiatives</li><li>6. The provision of accurate and insightful financial risks and opportunities to the current plan.</li><li>7. The provision of value-adding support to Finance colleagues on the monthly KPI reporting, to help improve the business-wide understanding of both current &amp; future business performance</li></ol> |
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<b>Date Role Profile Created/Updated:</b>	<b>July 2019</b>
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