



## Job Description

Job Title:	Financial Planning & Analysis Manager
Job Level:	3
Reports To:	Interim Finance Director
Role Profile dated:	April 2026

## Job Specification

### Role Purpose:

- To lead financial planning, forecasting, and performance analysis across the organisation, ensuring robust financial insight and control over levy income, programme spend, and operational costs.
- To drive efficiency, value for money, and effective allocation of levy funds, supporting delivery of measurable outcomes for employers and industry.
- To provide strategic financial support and challenge stakeholders, enabling data-driven decision-making during a period of organisational change.
- To strengthen FP&A capability, reporting, and systems, ensuring a single source of truth and high-quality financial governance across the organisation.

### Business Outcomes:

To be successful in this role the post holder must:

- Deliver accurate and timely budgeting, forecasting, and reforecasting aligned to organisational priorities and levy income.
- Provide clear, data-driven financial insights that influence senior decision-making and improve business performance.
- Ensure effective tracking and optimisation of levy utilisation, driving efficiency and measurable return on investment.
- Maintain strong financial governance, oversight, and reporting quality across programme and operational spend. Maintain strong financial governance, oversight, and reporting quality across programme and operational spend.

## **Key Responsibilities:**

- Project Management and preparation of annual budgets, forecasts, and reforecasts aligned to levy income and business priorities.
- Responsible for all financial planning requirements and forecasting across the organisation.
- Oversee financial performance tracking across programmes, including grant spend, cost efficiency, and return on investment.
- Lead the development of financial models to support strategic decision-making and funding scenarios.
- Ensure the effective monitoring and allocation of levy income across programmes to maximise value and impact.
- Support senior leadership with clear, insightful financial analysis, including performance reporting and business cases.
- Manage, coach, and develop a small FP&A team, strengthening capability and succession planning within the finance function.
- Produce high-quality management information, dashboards, and reporting (including development of data-led insights and systems in collaboration with IT).
- Other responsibilities as may reasonably be assigned to you.

## **Role Parameters:**

- Line management responsibility.
- Home-based with some UK travel as required.
- This role requires collaboration with internal and external stakeholders, including government bodies.
- This role requires a Basic DBS check to be made before employment can start.

## **Person Specification**

### **Experience & Qualifications**

- Qualified accountant (ACA, ACCA, CIMA or equivalent).
- Experience in FP&A, including budgeting, forecasting, and financial modelling.
- Ability to deliver insightful financial analysis, including cost efficiency, performance reporting, and ROI assessment.
- Proficient at advanced Excel; experience with Power BI or similar data visualisation tools is desirable.
- An ability to communicate complex financial information clearly and effectively to non-finance stakeholders and influence senior leaders.
- Capable of leading and developing teams, driving continuous improvement, and operating effectively in a changing organisational environment.
- Involvement in financial due diligence (desirable)