

Finance Business Partner, Learning Directorate			
Based	1 Wimpole Street, London	Travel	No travel required
Reports	None	Reports to	Head of Education
Seniority	Manager	Hours	35 hours per week, Monday to Friday (Additional hours may be required at busy times, eg month, quarter and year-ends)
Key areas of influence	<ul style="list-style-type: none"> Financial planning and analysis for the RSM Learning Directorate, including advising members, programme managers and senior budget holders on financial planning Delivery of monthly management accounts and other financial reports as required to RSM Sections and the Learning Directorate requirements Supporting delivery of the Learning Directorate and corporate KPIs (relating to the Learning Directorate) and developing analyses to identify and anticipate trends, opportunities and risks Business partnering across the Learning Directorate and key stakeholders, in particular the RSM Sections and programme managers, Heads of Department, the Director of Learning. Working with the Heads of Department across the RSM charity and and Commercial Services 		
Key contacts	<p>Internal: Learning Directorate Heads of Department, RSM programme managers and Section Councils, in particular Presidents and Treasurers, RSM Heads of Department Commercial Services (business partnering).</p> <p>External: In partnership with central Finance and IT responsible for the RSM Finance system and Power BI consultants (eg m-hance, Felinesoft)</p>		
Facts and Figures			
<p>Budgets – Overseeing and supporting the setting and monitoring of budgets for the Sections, supporting the Learning Directorate Heads on budget development and analysis.</p> <p>Customers – Primarily internal and members but senior (incl very senior members, Directors, Heads).</p> <p>Level of autonomy – the role will interact with senior staff.</p> <p>Access to confidential information – financial information and potentially confidential planning information</p> <p>Specialisms (areas in which this role acts as the primary function for the RSM) – Excel, Power BI and/or other analytics tools; Budgeting and Forecasting; Management accounts; Finance systems</p>			
Key Outcomes (Role Purpose)			

- Support in the production of consolidated annual budgets and forecasts for the Learning Directorate – liaising with the Learning Directorate budget holders and member volunteers (particularly Section Presidents and Treasurers) to develop reports suitable for financial planning
- Delivery of monthly Section Accounts, including ongoing development of reporting to support business needs, and working with budget holders to develop operational plans regarding significant variances to ensure sustainable budgeting
- Developing Power BI and similar reports (both for Finance and the wider business, as required)
- Work with the central Finance team on KPI reporting, management account analysis and budget development.

Key Objectives (Role Responsibilities)

Annual budgets & forecasts

- Outline suitable timelines for the Learning Directorate, and in particular Sections, to deliver annual budgets
- Work with Learning Directorate and member volunteer (treasurer) budget holders to run through necessary iterations
- Develop reports to support presentation of the Learning Directorate consolidated budget to SMT and Council (and committees)
- Deliver analysis and forecasts as required

Monthly Management Accounts

- Delivery of monthly Section Management Accounts and monthly meetings with programme managers and Section Treasurers
- Ongoing development of reporting to support business needs
- Working with budget holders to develop sustainable financial operational plans

Power BI Reports

- Developing Power BI, Excel and similar reports for key stakeholders
- Working, where necessary, with external consultants to improve existing Power BI and similar reports
- Providing training to stakeholders on using Power BI and similar reports

Business Partnering

- In addition to monthly budget holder meetings, act as the day-to-day business partner for the Learning Directorate

Support the Director of Learning

- Developing and delivering RSM Learning Directorate KPI reporting.
- Responding to all ad hoc report and inquiry requests relating to financial reporting (outside the annual audit)

Person Spec- Key Competencies

- Influencing - An ability to motivate and enthuse colleagues in meeting high standards.
- Creative, innovative - ability to respond to challenges and create novel solutions for the benefit of teams, colleagues and external stakeholders.

- Communication and Presentation - an effective communication with the ability to adapt style to suit audience.
- Highly numerate with strong analytical skills and experience of business partnering.

Person Spec
Personal attributes, knowledge, experience & qualifications - Essential

- Part qualification of a professional accounting qualification (CCAB, or equivalent) and or AAT or similar book keeping qualification and evidence of ongoing CPD.
- Solid experience of working in a finance team.
- Financial accounting experience/ knowledge.
- Proven successful record of managing internal accounts processes.
- Experience of report writing.
- Understanding of fund accounting.
- Understanding of UK accounting standards.
- Track record of successfully building strong working relationships with multiple stakeholders.
- IT literate and ability to analyse data and extract and use trends.
- Ability to work under pressure and on own initiative.

Person Spec
Personal attributes, knowledge, experience & qualifications - Desirable

- Experience in a membership organisation or similar.
- Experience of Excel,, Power BI and analytics
- Knowledge of the Charities SORP.

Organisational values & behaviours
The following generic statements are included in all RSM Job Profiles.

The post holder must always when conducting responsibilities and interacting with others:

- a) Uphold the RSM values. Specifically treating others with RESPECT, INVESTING in people to help them develop and grow, striving to continuously IMPROVE what we do by setting ourselves and others stretching objectives and measuring outcomes, LISTENING to colleagues, customers and COLLABORATING to achieve more new ideas, DELIVERING our intentions.
- b) Adhere to the Society's Health and Safety regulations and ensure the safety of oneself and others engaged in the RSM premises and work by reporting hazards to a senior manager for address or taking actions (where possible) to remove safety hazards.
- c) Adhere to the Society's GDPR regulations and only use data as required to undertake their role and handle it in an appropriate and confidential manner.

d) Fully subscribe to the spirit of and adhere to the Society's people policies the RSM's Code of Conduct.

