

## Role and person profile

|                 |                                                |                               |                                         |
|-----------------|------------------------------------------------|-------------------------------|-----------------------------------------|
| Post title:     | <b>Senior Financial &amp; Planning Manager</b> | Location:                     | <b>Manchester with Guildford travel</b> |
| Division:       | <b>Finance and Corporate Services</b>          | Department:                   | <b>Finance</b>                          |
| Responsible to: | <b>Head of Finance</b>                         | Responsible for:              | <b>Management Accounting Team</b>       |
| Scale:          | <b>8</b>                                       | Cornerstone behaviours level: | <b>Manager of performers</b>            |
| Post no:        | <b>1180</b>                                    |                               |                                         |

### Purpose

The primary role of the Senior Financial & Planning manager is to lead through a team of Finance Business Partners to produce the financial planning, forecasting and financial decision support for Senior leadership working closely with the Business Planning team. To enable the provision of impactful financial analysis to influence the Senior leadership team and decision makers within AQA which will drive business performance. A key part of the role is to develop and nurture a team to their full potential by providing coaching, clarity of direction and modelling strong leadership behaviours.

### Key accountabilities

1. Lead, manage and develop the team to create a high performing team who deliver effective, efficient and enabling outcomes in accordance with agreed key performance targets.
2. Produce and continually develop accurate and insightful financial forecasts with clear story telling and a robust risk and ops process. Have clear actions to drive performance ensuring ownership of financials within the business.
3. Lead the team to provide excellent finance business partnering support to the business. Be the 'critical friend' ensuring there is a seat at the table to influence, support and challenge. Influence the business with critical financial analysis and facts to support decisions.
4. Lead the team to understand and identify overall business trends and key drivers in order to provide insightful financial analysis to influence the business to drive profitable and sustainable growth.
5. Embed commercial acumen through proactive engagement and challenge, via relevant stakeholders, with all major business proposals and decisions that have a significant financial dimension.
6. Where appropriate lead the production of high quality financial forecasting, performance and benefits realisation for projects across the business working closely with Business Planning team. Influence the business with clear financial analysis and presentations to support decision making.
7. Create and deliver executive presentations for senior management.
8. Manage the delivery of in year forecasting and KPI interpretation (eg forecast accuracy) to continue to improve financial capability and a self serve mentality in the business.

9. Lead the team to deliver ad hoc projects such as bids, contracts and business cases where appropriate. Influence the business with clear financial analysis and presentations. Produce an accurate and clear reporting process to support the business to make informed decisions.
10. Be a catalyst for change programmes and process improvements, developing new ideas and solutions to enhance and develop reporting and analysis.
11. To lead by example with AQA values and behaviours.

### General accountabilities

1. To model leadership behaviours with confidence and to get the very best from direct reports and teams by providing clarity, feedback, coaching and development, while continuously seeking to enhance performance in line with business objectives.
2. To comply with all AQA's policies and other legislative requirements, including but not limited to HSE, Equal Opportunities and ISMS.

### Person profile

| Knowledge                                                                                                                                                   | Assessment |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| Understands the principles and practices of Charity accounts and the Charity SORP                                                                           | A/I        |
| Has a strong Management accounting background and work record                                                                                               | A/I        |
| Has strong commercial knowledge and awareness                                                                                                               | A/I        |
| Qualification                                                                                                                                               |            |
| Qualified Accountant CCAB                                                                                                                                   | A          |
| Skills                                                                                                                                                      |            |
| Ability to engage with stakeholders and influence through all levels of the organisation                                                                    | A/I/P      |
| Strong planning, management and leadership skills                                                                                                           | I/P        |
| Strong verbal and written communication skills                                                                                                              | A/I/P      |
| Highly organised and an excellent planner                                                                                                                   | I/P        |
| Team player - able to work in partnership with the Finance team and heads of department                                                                     | I/P        |
| Coach and develop the management accounting team members                                                                                                    | I/P        |
| Coach and mentor staff, experience in providing advice and guidance to senior managers on financial related matters, acting as an expert point of reference | I/P        |
| Good interpersonal skills and willing to make a positive contribution to the company's culture                                                              | I/P        |
| Leadership skills                                                                                                                                           |            |
| Accountability for building a successful team                                                                                                               | I/P        |
| Displays infectious energy and inspires others, building a sense that working at AQA is an exciting and worthwhile challenge                                | I/P        |
| Alert to ways to capitalise on opportunities that arise to deliver a quick business benefit                                                                 | A/I/P      |
| Creates an organisational climate which actively encourages and rewards purposeful innovation                                                               | I/P        |
| Sets out to build and reinforce an empowered culture of service excellence                                                                                  | A/I/P      |
| Champions and embodies a passion for delivering great results                                                                                               | I/P        |

|                                                                                                                              |                                  |
|------------------------------------------------------------------------------------------------------------------------------|----------------------------------|
| Monitors to ensure the whole system is operating consistently in a way that enhances service delivery                        | I/P                              |
| Work flexibly using situational leadership to raise performance                                                              | I/P                              |
| Ability to translate a vision into achievable goals and provide clear direction to achieve organisational objectives         | I/P                              |
| Inspire and motivate team members and other colleagues                                                                       | I/P                              |
| Ability to lead by example to develop and maintain effective working relationships with a range of partners and stakeholders | I/P                              |
| <b>Experience</b>                                                                                                            |                                  |
| Experience of producing monthly/quarterly accounts and reporting packs                                                       | A/I/P                            |
| Significant experience in dealing with customers at all levels.                                                              | A/I/P                            |
| Senior level experience of leading and managing a team independently                                                         | A/I/P                            |
| Techniques for dealing effectively with staff, government agencies and external auditors in person and over the telephone    | A/I/P                            |
| <b>AQA's Behaviour Framework which is assessed through the selection/probation process</b>                                   |                                  |
| Assessment key (criteria to be assessed at the selection stage)                                                              |                                  |
| <b>A</b> – application (it is <b>essential</b> to provide evidence on application for shortlisting purposes)                 |                                  |
| <b>I</b> - interview                                                                                                         | <b>T</b> – test (or work sample) |
|                                                                                                                              | <b>P</b> – probation             |