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**Job Description**

**Job title:** Finance Business Partner

**Reference:** SUS2748

**Salary:** Grade I: £35,388 per annum

**Contract:** Permanent

**Hours:** 37.5 hours per week

**Location:** Sustrans Scotland office in Edinburgh

**Job purpose**:

To provide a comprehensive professional accountancy and general financial advisory service to leaders, managers and staff in Scotland, providing 'real time' financial support and analysis, being a trusted adviser and contributing to and providing information which enables effective decision making and informing the development of strategic and operational plans.

To work as part of Sustrans senior leadership team in Scotland, particularly leading the financial and accountancy support for the c£60m government-funded Scottish active travel programme. To develop effective working relationships, support, influence and challenge management teams on financial matters, ensuring finance and the way money is thought about is aligned with Sustrans strategic plan.

**Place in organisational structure:**

The post holder reports to the Financial Controller who is based in Bristol.

The post holder will line manage the Senior Finance Coordinator who is based in Edinburgh.

**Dimensions of role:**

As a senior member of the Sustrans national finance team, this role ensures that finance and the way we use and think about our money is front and centre of the transformation agenda for the charity, as we move into a new strategic plan period.

Our business partners provide a comprehensive professional accountancy and general financial advisory service to leaders, managers and staff within the areas of the organisation for which they are responsible. They bring finance out of the back office, and create an active partnership between finance and operations. This includes providing 'real time' financial support and analysis, being a trusted adviser, and contributing to and providing information which enables effective decision making, and informing the development of strategic and operational plans.

This role will work primarily as part of Sustrans’ senior leadership team in Scotland, particularly leading the financial and accountancy support for the c£60m government-funded Scottish active travel programme. The post holder will also business partner other Sustrans departments nationally; initially Northern Ireland and our Research and Monitoring Unit.

**Key relationships:**

Internal: Financial Controller (Bristol)

Senior Finance Coordinator, Scotland

National Director, Scotland & Ireland

Director, Sustrans Scotland

Director of Finance, Resources & Governance (Bristol)

Other Directors and SLT members

Finance team

Budget holders

External: External auditors

Government departments

Other funders

**Key responsibilities:**

**Delivery of projects or services:**

1. To partner Scotland staff as a specific area of the charity, developing effective working relationships, supporting, influencing and challenging the management team on financial matters in order to deliver the best outcome for the charity.
2. To present financial reports to directors and managers in Scotland, to engage with the monthly finance team accounts reviews, Quarterly Finance Meetings and relevant Portfolio Management Boards, ensuring there is an ongoing dialogue on financial performance and that risks and issues are escalated appropriately.
3. To work in partnership with the Director, Sustrans Scotland and senior management team to ensure that funding received from Transport Scotland is allocated to projects in a transparent way and that the process for allocation is financially robust and reflects the requirements of both Sustrans internal governance requirements and those of the funder
4. To collate, analyse and summarise live and accurate financial information to enable clear monitoring, forecasting and reporting relating to the Transport Scotland programme, including under / over-allocation of funding, project cost and cash flow statements, and escalating financial issues and risks to both the Scotland team and Financial Controller / Finance Director where necessary.
5. To provide specific reporting in relation to Transport Scotland funding, including preparing the annual Transport Scotland report for audit, attendance at monthly meetings and regular formal quarterly reporting. In addition, to provide other accurate and timely updates to Transport Scotland on the use of funds as required and to respond to questions from civil servants on use of funding, including under/over-allocations and timing of spend
6. To work in partnership with budget holders at all levels to deliver effective financial planning through the development of relevant elements of the charity's business plan and budget, ensuring that local priorities support the delivery of the Charity’s overall financial and strategic priorities.
7. To liaise with local funders and partners to ensure that they provide regular, timely financial information, invoicing and updated forecasts.
8. As an integral part of the Sustrans finance team, and following the Charity’s processes, to produce monthly directorate management accounts, including forecasts and financial risk evaluations, reporting on deviations from budget and recommending corrective actions and mitigation measures.
9. To support the development of systems and processes which constantly and closely monitor grant allocation, expenditure and funding streams and to provide financial data locally and to the finance team which contributes to the development of operational plans and financial strategy.
10. To ensure that robust financial controls operate throughout all finance processes across the Charity, escalating issues appropriately and reporting any breaches of the Charity’s governance requirements to the Director of Finance, Resources and Governance.
11. To actively contribute to the continual improvement of the performance of the finance team, financial policy and procedures and to charity-wide financial performance and practice.
12. To liaise between local teams and the Finance and IT teams to ensure that local systems developments are robust, compliant and fit for purpose, and where possible, standardised across all regions and geographies of Sustrans.
13. To ensure that staff make effective use of the Charity’s financial and time management systems (FocalPoint) and the Scotland Portal.
14. To develop and deliver financial training to budget holders and to work continually to develop budget holders’ financial management skills.
15. To provide the external auditors with any documentation or evidence required for Sustrans’ year-end audit.

**People management**

1. To manage, develop and coach the Senior Finance Co-ordinator – Scotland, by setting clear objectives and monitoring performance to maximise potential.
2. To work with HR to ensure that training and development of staff is planned effectively and in line with business need.

**Communication and marketing**

1. To support and comply with the charity’s guidance on branding, tone of voice and key messages, positively contributing towards raising Sustrans’ profile.

**Training and personal development:**

1. To attend essential Sustrans training as required by the Charity

**Health & Safety, Safeguarding and Equality, Diversity and Inclusion:**

1. To support and comply with the Charity’s policy for the management of Health and Safety.
2. To support and comply with the Charity’s policies for the management of safeguarding.
3. To support and comply with the Charity’s policy and procedures relating to Equality, Diversity and Inclusion and apply principles of best practice in own role.

**Other**

1. To perform any other duties consistent with the nature and grade of the role as agreed with the line manager.

**Working conditions:**

The post-holder will normally work at the nominated office base, although there may be opportunities to work from home at times. Some UK-wide travel will be required. Overnight stays away from home may be necessary when participating in meetings and projects away from their designated base. Occasional weekend and late working may be required with time off in lieu. The post-holder must be prepared to cycle, walk or use public transport for the majority of work journeys.

**Special note:**

This job description does not form part of the contract of employment, but indicates how that contract should be performed. The job description may be subject to amendment in the light of experience and in consultation with the jobholder.

Compiled by: Financial Controller

Date: July 2019

**Finance Business Partner (SUS2748)**

**Person specification**

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| **Criteria** | **Essential** |
| Qualifications, education and training | Educated to degree level or equivalent and part-qualified in a Chartered accountancy qualification, specifically – ICAEW, CIMA, CIPFA, ACCA. ‘Part-qualified’ to mean all exams passed at the penultimate level of the qualification, e.g. CIMA “Management” level |
| Experience | Substantial experience in a related position  Proven experience of providing finance advice, support and challenge to budget holders, including Director-level colleagues  Experience of the preparation of budgets and management accounts  Experience of financial management and reporting for high value complex grant management or delivery programmes  Experience of interpreting and analysing accounts and other financial information and advising accordingly  Experience of optimising the use of finance software  Line management experience  Experience of working independently  Experience of building effective working relationships and providing proactive advice  Experience of the preparation and presentation of accounts and other financial information for audit and external scrutiny |
| Skills and abilities | A high level of IT literacy, particularly MS Excel  Highly developed analytical skills  The ability to be organised and methodical  The ability to work accurately  An ability to complete tasks to deadlines  Excellent communication skills with the ability to present information clearly both verbally and in writing.  Excellent interpersonal skills with the ability to build effective working relationships with a variety of staff and our external partners.  Ability to plan, organise and prioritise workloads.  Ability to work as a key member of a team. |
| Knowledge | Finance software, such as Access Dimensions, Sage or other similar packages  Accounting for charities |
| Other | Commitment to the vision and values of the Charity  A flexible approach to work and enjoy a hands-on involvement |