



**Ormiston  
Families**

Brighter futures

# Business Analyst Finance





## A message from our CEO, Allan Myatt



Dear Applicant,

Thank you for your interest in the post of Business Analyst within our Finance team.

As an organisation, Ormiston Families has agreed that our strategy for the next 3 years is to enable children, young people and their families to feel safer, healthier and more resilient. We also recognise that we need to build the resilience of the organisation, so we are fit to meet the challenges ahead.

Over the next few months we will continue to develop the strategy identifying key objectives for the next 3 years and making necessary organisational and operational changes to enable us to deliver the strategy in the new financial year. We see the recruitment of this post as critical in helping us achieve these objectives.

I wish you the best of luck with your application.

Best regards,

A handwritten signature in black ink, appearing to read 'Allan Myatt' with a stylized flourish at the end.

Allan Myatt



## **Our vision**

**Safe, healthy, resilient families**

## **Our mission**

**Enabling families in the east of England to build resilience and make choices to improve the life chances of their children**

## **Our values**

### **Collaborative**

- Working together with families
- Building partnerships, communities and networks to support families
- Valuing each other to achieve results and improve everything we do

### **Compassionate**

- Listening, so we can understand
- Treating people with respect
- Enabling, recognising and reinforcing achievements

### **Effective**

- Evidencing the impact of our work with families
- Prevention and early intervention being at the heart of our work
- Building resilience to cope and recover from adversity



**Ormiston Families is one of the leading charities working with children, young people and families in the East of England. We take early and preventative action to support families to be safe, healthy and resilient. All our services help people to build stronger networks, learn from experience and feel in control of their own wellbeing. We can only achieve this with the people who choose to work for us.**

We have an exciting opportunity for an experienced Business Analyst to join our Finance Team at Ormiston Families. We are looking for someone who is passionate about the work that we do and will support our successful team in analysing our monthly results, generating reporting dashboards and produce our 3-year forecast and budget, developing this into a rolling continuum of business analysis.

### **About the role**

This role entails provision of specialist support to the Finance Manager, Finance Director and wider organisation. An experienced business analyst/management accountant reporting to the Finance Manager to lead our budget, quarterly forecast and 3-year financial business plan across the group. Leading support to service managers with their understanding of finances and development of their 3-year service plans. Review monthly management information produced, analyse and prepare dashboards including non-financial data. Continual development of management reporting as needs change and to support growth in our activities both charitable and trading.

### **About you**

Good excel and communication skills will be essential in addition to accounting knowledge and experience of accounting software.

This is a permanent full-time position, 35 hours per week; Starting salary £34,478 per annum.

### **Probationary Period**

The post is subject to a probationary period of six months during which your progress will be monitored in accordance with agreed objectives.

### **Application Process**

Applicants must send in a completed online application form; you must demonstrate that you hold the personal competencies required for the role and how you meet the relevant skills, knowledge and experience.

Ormiston Families is an equal opportunities employer. We value diversity and welcome applications from all sections of the community. We ask individuals to complete a monitoring form to help us monitor the diversity of applicants. It will be separated from your application form and will not be seen by anyone involved in recruitment to this job.

Please note: Only successful applicants will be contacted by Ormiston Families



## Job Description

**Job Title:** Business Analyst

**Service:** Finance

**Location:** Ipswich or Norwich Office with travel to operational locations across the region and homeworking as appropriate.

### Job purpose:

Provision of specialist support to the Finance Manager, Finance Director and wider organisation. An experienced business analyst/management accountant reporting to the Finance Manager to lead our budget, quarterly forecast and 3 year financial business plan across the group. Leading support to service managers with their understanding of finances and development of their 3 year service plans. Review monthly management information produced, analyse and prepare dashboards including non-financial data. Continual development of management reporting as needs change and to support growth in our activities both charitable and trading.

### Main Duties and Responsibilities:

- To lead the preparation of organisational consolidated budgets and rolling 3 year forecasting throughout the complex group of charitable and trading companies.
- Ensure budgets and forecasts are accurately maintained on software systems.
- Provide specialist accounting support to the Finance Manager and Finance Director in the development of organisational financial strategy
- Review management reports and financial reporting to managers and funding bodies and drive continual development.
- Carry out finance and business activity reviews with budget holders and provide specialist financial modelling support.
- Review contract performance and evaluate with, Managers, Directors and external stakeholders such as service commissioners.
- Providing essential understanding of financial management to managers of varying degrees of financial experience and ability including training and coaching as needed.
- Lead the charity's standard costing methodology for indirect and support costs, developing as a continually evolving model as the organisation grows and needs change.
- Review and appraise the draft results for the trading subsidiary companies.
- Perform financial appraisals with Nursery Operations team for nursery settings both current and potential new additional settings.
- Monitor and evaluate Restricted Funds and Free Reserves levels for the charity.
- Produce the Board and other Dashboard reports and Key performance indicators.



- Preparation and appraisal of financial information for bids and tenders
- Preparation and appraisal of adjusted EBIT and ROI calculations, including identifying and requesting necessary information from external stakeholders.
- Contribute to the due diligence review of potential organisations to partner, takeover or merge with.
- Investigate performance variances, advise and recommend appropriate action.
- To review contract terms and conditions for income and expenditure ensuring a complete knowledge of commitments and representation in management reporting, maintaining central contract records where appropriate.
- Deputise for the Finance Manager when required.
- Provide specialist support to the Finance Manager with internal audits, investigating matters as appropriate and providing investigation evidence for formal HR and other processes.
- Awareness of the confidential nature of data in use, ensuring confidentiality and appropriate use of that data.
- To be an effective and fully participating member of the Central Support team, supporting services and facilitating future organisational development and growth.
- To work within Ormiston's mission and values and all policies and procedures, including Safeguarding, Data Protection, Equality and Diversity, Participation, Quality and Health and Safety. Comply with relevant external standards and Quality Marks.
- To carry out any additional appropriate duties as instructed by the Finance Manager.



## **Generic Responsibilities – All Posts/Employees**

The following are applicable to all posts and all employees.

### **General Duties**

- To undertake any other reasonable duty, which is appropriate to the grade when requested by Senior Staff.
- To be familiar with and comply with all Ormiston Families policies, procedures, protocols and guidelines.
- To demonstrate an understanding and commitment to the charity's values.

### **Professional and Personal Development**

- All staff must ensure that they are aware of their responsibilities by attending Mandatory Training and Induction programme.
- All staff will have a formal appraisal with their manager at least every 12 months. Once performance/training objectives have been set, the staff member's progress will be reviewed on a regular basis so that new objectives can be agreed and set, in order to maintain progress in the service delivery.
- All staff will be expected to take responsibility for their own professional development and will be supported to achieve development opportunities as appropriate.

### **Health and Safety**

- All staff have a responsibility to maintain health and safety of self and others within the performance of duties in accordance with health and safety policies, and to undertake specific health and safety responsibilities as directed. All staff have a responsibility to adhere to the Risk Management Policies & Procedures.
- All staff are required to contribute to the control of risk, and must report immediately any incident, accident or near miss involving service users, carers, staff, contractors or members of the public.

### **Confidentiality and Information Governance**

- All staff may gain or have access to confidential information about the assessment and/or treatment of service users, information affecting the public, private or work-related staff information, or Charity matters. A breach of confidentiality will have occurred where any such information has been divulged, passed (deliberately or accidentally) or overheard by any unauthorised person or person(s). Breaches of confidentiality can result in disciplinary action, which may involve dismissal.
- All staff must maintain a high standard of quality in corporate and clinical record keeping, ensuring information is always recorded accurately, appropriately and kept up to date. Staff must only access information, whether paper, electronic or in other media which is authorised to them as part of their duties.

All staff must ensure compliance with the Data Protection Act 1998.



### **Safeguarding: Adults and Children (Section 11 of the Children Act 2004)**

- Every member of staff has a responsibility to be aware of and follow at all times, the relevant national and local policy in relation to safeguarding children and safeguarding adults.

### **Senior Managers**

- Under Section 11 of the Children Act senior managers have responsibility for ensuring that service developments take into account the promotion of welfare and is informed by the views of children and families; providing training on safeguarding for all staff; recruiting safely; ensuring there is effective inter-agency working and information sharing.

### **Data Quality**

- The Charity recognises the role of reliable information in the delivery & development of its services and in assuring robust clinical and corporate governance. Data quality is central to this and the availability of complete, comprehensive, accurate and timely data is an essential component in the provision of high-quality services. It is therefore the responsibility of all staff to ensure that where appropriate, information is recorded, at all times, in line with the Charity's Policy and Procedures for Data Quality.
- This job description seeks to provide an outline of the duties and responsibilities of the post. It is not a definitive document and does not form part of the main statement of Terms and Conditions. The job description will be reviewed as part of the annual appraisal process and will be used as the basis for setting objectives.



## Person Specification

### Relevant experience

- Proven experience providing management accounting / business analysis service.
- Expertise in the use of Excel including formulae and data modelling.
- Use of accounting software, ideally Access Dimensions.
- Financial accounting as key foundation to management reporting.
- Explanation of financial information and processes to non-financial colleagues.
- Experience of Charities and trading subsidiaries desirable.
- Experience of reporting at all organisational levels including Board level desirable.
- Experience of managing finance staff and/or volunteers.
- Electronic data upload/download experience desirable.

### Skills & knowledge

- Advanced ability to monitor and analyse financial and non-financial data, evaluate performance and forecast forward.
- Budgetary and forecasting skills
- Use of standard costing and limiting factor methodologies
- Knowledge of EBIT and ROI
- Knowledge of transfer pricing
- Skilled in the presentation of financial information to different audiences

### Personal competencies

- Qualified accountant with post qualification experience or qualified by experience
- A positive and resilient professional attitude
- Ability to work on own initiative and as part of a team
- Able to work remotely and in office environments
- Provision of an acceptable DBS check
- "love of" financial modelling and formulae, preferably in excel



## Information about working for Ormiston Families

You may find it helpful to know the following information about this position.

### **Duration:**

- The post advertised is a full-time permanent position, 35 hours per week.

### **Hours of work and working arrangements:**

- The normal working week is 35 hours, Monday to Friday and covers 52 weeks per year.
- You may be required to work flexibly to meet the needs of the organisation including evenings and weekends.

### **Location:**

- The post will be located at our Ipswich or Norwich Office with travel to operational locations across the region and homeworking as appropriate.

### **Progressing through your grade:**

- Your salary will rise with the scale by one increment each year up to the maximum of the scale. Increments are awarded annually on the 1st April.

### **Probationary Period:**

- The post is subject to a probationary period of 6 months during which your progress will be monitored in accordance with agreed objectives.

### **Salary:**

- The scale for this post is grade 10 point 37, currently £34,478 per annum
- Salary is paid in 12 equal instalments on the 25th of each month directly into your bank account and covers work carried out in the calendar month.



## Benefits & recognition

All benefits are discretionary, and Ormiston Families reserves the right to change or amend benefits at any given time.

### **Cycle to Work:**

- Cycle to Work allows you to order a new bike, equipment or both up to the value of £1,000 which you can pay back through your salary to make tax savings.

### **Annual leave entitlement:**

- The basic annual leave entitlement is 27 days plus additional leave for employees who have completed 3 years' service up to a maximum of 30 days as follows:
- Part-time employees receive a pro-rata allowance according to the number of hours they work per week).

### **Group Life Assurance:**

- Ormiston Families provides a death in service benefit to all permanent employees.

### **Occupational sick pay scheme:**

- Ormiston Families operates an occupational sick pay scheme in addition to statutory sick pay.

### **Pension:**

- Ormiston Families provides a Group Personal Pension Scheme with up to 9% of gross salary employer contribution for any employee where they match the level of contribution.

### **Sponsorship:**

- Ormiston Families provides sponsorship to employees who have completed their probationary period and been in post for at least 12 months to undertake nationally accredited or chartered certification awarded by professional associations.

### **Employee Assistance Programme:**

- Ormiston Families provides a comprehensive employee assistance programme which offers free and confidential access to telephone and face to face counselling (up to 6 sessions), financial and legal advice and assistance in finding information about a wide range of subjects from childcare to moving to a new house.

### **The Hive:**

- The Hive is a savings platform which can be accessed by employees to make everyday purchases at reduced costs. Employees can save money by purchasing reloadable cards, obtain cashback through online purchases, and make savings in some stores.

### **The Well-being Centre:**

- Accessed via The Hive, the Wellbeing Centre provides education, support and tools to help you live a healthier and happier life.



## Requirements of the post

### Qualifications:

- If short-listed and you are required to hold a particular qualification for a post it is your responsibility to provide the relevant certification, to prove you are suitably qualified.
- Failure to produce documentary evidence of qualifications or undertake required courses/training may result in the termination of your employment.
- If a post requires you to take training or additional qualifications then, by accepting this post, you are agreeing to do the training or take the qualifications.

### Medical examination:

- To ensure the post will not have a detrimental effect on your health or your health on your work, you will have to complete a health enquiry form on appointment and may be required to have a medical before the appointment can be offered formally.
- This is to confirm that you are able to satisfactorily carry out the post without any impact on your health (taking account of any reasonable adjustments required).

### Immigration, Asylum and Nationality Act 2006:

- Before you can start working for Ormiston Families a check will need to be carried out to ensure you are eligible to work legally in the UK.
- This check will be undertaken in accordance with the Immigration, Asylum and Nationality Act 2006.
- You must supply proof of your entitlement to work in the UK by producing certain document(s) and you will be asked to bring these to your interview if you are shortlisted.
- Further information on working in the UK can be found by clicking on the link below to the UK Border Agency website: Link: <http://www.ukba.homeoffice.gov.uk/visas-immigration/working/>

### Disclosure and Barring Service (DBS) checks:

- As this position meets the definition of regulated activity under the Protection of Freedom Act 2012, appointments to this post will be subject to an enhanced DBS check with barred list check
- Employment can commence once the check has been satisfactorily completed.
- If a candidate has a conviction on their DBS check, an assessment of the relevance and impact of the conviction in relation to the post will be done to determine if the job offer can be confirmed.
- It is a serious criminal offence to knowingly apply for posts when you have been barred from working with children/young people and/or vulnerable adults.
- Additional questions for roles working with children, young people or vulnerable adults to be explored at interview
- As this post involves working either with children and young people or vulnerable adults Warner or Safer care motivational type questions may be asked during the interview process.
- These questions are asked to establish your suitability to work with vulnerable groups by understanding your attitude, behaviour and responses to situations.
- The questions will relate to your inspiration for working with vulnerable groups, your ability to build relationships and your resilience when working with such groups and may also explore your attitude to the use of authority.
- If you feel you would find these questions about yourself difficult to respond to then you may wish to reflect upon your suitability for the post.



**Transport status:**

- If the post requires you to travel as part of your duties, you are responsible for your own travel arrangements.
- Any mileage undertaken on behalf of Ormiston Families will be paid at the appropriate rate and within Her Majesty's Revenue and Customs guidelines.
- If you use your own vehicle for the purposes of work you must ensure that your insurance policy covers you for this purpose.

**No smoking:**

- Ormiston Families operates a Smoke Free Premises policy.



## Standard Terms and Conditions

### Probationary period:

- All new employees of Ormiston Families will be required to complete a 6-month probationary period. This may be extended in some circumstances.

### Equal opportunities:

- Ormiston Families seeks to ensure that all employees are selected, trained and promoted on the basis of ability, the requirements of the post and other similar and objective criteria.
- The gender identity, disability, marital status, ethnic origin, age, pregnancy status, religion or belief, or sexual orientation of an applicant or employee does not affect the employment opportunities made available, except as permitted by legislation.
- In addition, applicants declaring a disability who meet the minimum (essential) criteria for a vacancy will be invited for interview.

### Data protection:

- Ormiston Families is required by law to comply with the Data Protection Act 1998.
- Employees have an important role to play in ensuring that personal information is processed lawfully and fairly.
- Personal information is information relating to a living individual who can be identified.
- It is each individual employee's responsibility to handle all personal information properly no matter how it is collected, recorded and used, whether on paper, in a computer, or on other material.
- Personal information must not be disclosed to others unless authorised to do so.

### Notice:

- Once your probationary period is completed, you will be required to give at least 4 weeks' notice in writing of termination of employment dependent upon length of service.
- You are entitled to receive a similar period to the notice you have to give or the minimum statutory provision under the Employment Right's Act 1996, whichever is greater, as set out below:

#### Grades 1-7:

- Less than 6 months' service: 1 month
- More than 6 months' service: 1 month

#### Grades 8-9:

- Less than 6 month's service: 1 month
- More than 6 month's service: 2 months

#### Grades 10-14:

- Less than 6 month's service: 1 month
- More than 6 month's service: 3 months



## Application Process

- Applicants must send in a completed application form.
- You must demonstrate that you hold the personal competencies required for the role and how you meet the relevant qualifications, experience, knowledge and skills.
- **Ormiston Families is an equal opportunities employer.**
  - **We value diversity and welcome applications from all sections of the community.**
  - **We ask individuals to complete a monitoring form to help us monitor the diversity of applicants. It will be separated from your application form and will not be seen by anyone involved in recruitment to this job.**
- Shortlisted candidates will be asked to provide details of all unspent convictions and those that would not be filtered, prior to the date of the interview. You may be asked for further information about your criminal history during the recruitment process. If your application is successful, this self-disclosure information will be checked against information from the Disclosure & Barring Service before your appointment is confirmed.
- Applications will be considered and those shortlisted for interview will be informed.
- If you have not heard by the interview date we thank you in advance for your interest and ask you to assume that you have not been successful on this occasion.
- The post will be offered subject to satisfactory qualifications, DBS if applicable, references and a satisfactory declaration of health.
- The post will also be offered subject to the production of relevant documents as listed in the Immigration (Restriction on Employment) Order 2004.
- The successful candidate will be asked to provide evidence of identity and qualifications.

Closing date for completed applications: 9am, Thursday 5<sup>th</sup> August 2021

Interview date for short listed candidates: Tuesday 10<sup>th</sup> August 2021

**Any queries, please email: [finance@ormistonfamilies.org.uk](mailto:finance@ormistonfamilies.org.uk)**