

Role Profile

Details	
Job Title:	Financial Planning and Analysis Manager
Job Grade:	Manager
Reports to:	Head of Financial Planning and Analysis
Based in:	Harrogate, North Yorkshire
Hours:	Full time, 37 hours
Overall purpose	
The Financial Planning and Analysis Manager will support the Head of Financial Planning and Analysis in developing the charity's financial planning, budgeting, forecasting, management reporting and performance analysis processes. The role provides strategic financial insight to support decision-making, improve organisational performance and ensure sustainable delivery of strategic objectives. The role holder will be involved in offering high-quality business partnering services to teams within the charity. This includes helping budget holders and decision-makers with business planning and performance analysis, identifying areas of focus, developing and presenting financial plans, monitoring performance, achieving successful outcomes, and reporting on these outcomes. In addition, The Financial Planning and Analysis Manager will assist the Head of Financial Planning and Analysis (FP&A) with completing the annual financial budget and regular financial forecasts as well as playing a crucial role in key transformation projects, supporting Project Managers in delivering successful and financially stable programs.	
Key responsibilities	
Financial Planning • Support the Head of FP&A with the annual planning and budgeting cycle for the charity. Support the production of the annual budget and longer-term plans, making sure that numbers align with business plans and agreed strategy and that underlying assumptions are tested and evaluated properly. • Ensure annual plans are in line with Long Term Plan and provide analysis where needed. • Assist budget holders with developing and evaluating operational and business plans in line with strategic priorities ensuring collaboration across the charity. • Challenge planning and budget assumptions to ensure that numbers generated are robust. • Design and improve KPI dashboards and reporting packs. • Provide financial analysis of activities included in the budget and assist with appropriate budget phasing.	

- Produce the data to be consolidated into the overall budget, within agreed time scales and make sure budgets are captured into reporting correctly.
- Develop and maintain financial models, perform scenario planning and sensitivity analysis, along with evaluating the impact of risks and opportunities.

Business Support

- Maintain excellent engagement with and provide support to, budget holders, so that there is appropriate awareness of their budget management responsibilities.
- Deal effectively with queries from budget holders and senior management.
- Train budget holders in the use of financial processes when required.
- Monitor compliance with approved financial management and procurement procedures.
- Influence decision making through data and analysis.
- Participate in cross departmental initiatives and workgroups to ensure that the Finance team maintains the right level of influence to be effective.
- Be a key member of critical transformation projects when required, working with internal stakeholders across the charity and external service providers and suppliers to deliver successful outcomes.

Reporting

- Ensure robust Financial Performance Reporting including monitoring of month end management accounts and understanding variance analysis against budget. Monitor and report commercial KPI's against budget , highlighting key variances.
- Prepare ad hoc reports such as for projects or meetings as required.

Internal Control Environment

- Develop and implement finance policies and procedures ensuring effective controls are in place. Monitor and advise ways to improve the control of costs and supplies of services e.g. Retail build and fitout, CAPEX vs OPEX, additional multi use centre set up.

Qualifications

- Qualified Accountant (CIMA, ACCA) – desirable but not essential, will consider QBE.
- A knowledge of business operations processes, preferably in a charity environment.

Knowledge and experience

- Significant demonstrated experience of management accounts, business analysis and commercial management information.
- Proven experience, understanding and analysis of P&L, Balance Sheet and Cash Flow Analysis and reporting and trend analysis and forecasting.
- Experience in driving growth, and productivity through commercial analysis and support for non-Finance senior management.
- A knowledge of business operations processes, preferably in a charity environment. Demonstrable experience in simplifying complex content into a usable, jargon-free form for multiple audiences.

Skills and abilities

- Strong networking and interpersonal skills.

- Able to exercise diplomacy and build partnerships and consensus, within teams and among other stakeholders.
- Commercially astute and able to effectively communicate complex financial data and information to managers with non-financial expertise.
- Able to report and present complex financial information in an accessible and people friendly way to board members and others who do not have expertise in strategic management and accounts.
- Convincing and persuasive written, oral and presentation skills with the ability to present ideas and issues, clearly, and coherently.
- Robust analytical skills.
- Attention to detail, able to carry out tasks accurately, including correct data entry and reporting.
- Highly organised with good time management skills and the ability to prioritise a workload to meet deadlines.
- Excellent IT skills and confident using Microsoft Office including Excel, PowerPoint, Word and Outlook plus finance systems such as Microsoft Dynamics Business Central.
- Experience with Power BI or similar business intelligence tools desirable
- Proven experience in influencing a diverse range of stakeholders and building and maintaining close collaborative working relationships.
- Able to demonstrate effective decision-making skills and ability to exercise own initiative and judgement.
- Able to act as an Ambassador of the Yorkshire Cancer Research values, ensuring the values are integrated into all aspects of work.

Other requirements

- Ability to travel across the Yorkshire region.
- A willingness to complete our pre-employment checks (to be undertaken once the role is offered and accepted) which include:
 - A check on your employment history by seeking two references
 - A check on your eligibility to work in the UK as per the Immigration, Asylum and Nationality Act 2006
 - A check on your highest educational achievement(s)
 - A check on your professional qualification(s)
 - A DBS check at the level relevant to your role.
- Satisfactory completion of a pre-employment health assessment. If needed, you will also be required to undergo a medical assessment (at the charity's expense) by a medical practitioner of the charity's choosing.

DBS Check Level

- This role requires a DBS check at basic level.

Values and Behaviours

- Passionate about the values of Yorkshire Cancer Research (see 'Our Values' see below).
- Safeguarding is the responsibility of all employees who must remain aware and vigilant to potential safeguarding breaches and always report any suspicions or incidents following our internal reporting guidelines which will be shared during induction.

- Yorkshire Cancer Research operates a strict 'no smoking' policy throughout our premises, car parks and vehicles. Staff must not smoke whilst wearing Charity branded clothing or whilst on duty. If the post holder chooses to, the Charity will help and support them to stop completely or temporarily abstain from smoking during their working hours.



Our Values & Behaviours

Our Values



Our Behaviours

	Behaviours
Here for Yorkshire	The needs of people in Yorkshire come first Yorkshire Cancer Research exists to prevent diagnose and treat cancer in Yorkshire. The needs and interests of people in Yorkshire are at the forefront of what we do, how we think and how we act. People are the heart of everything we do When we develop new plans, projects and activities, we actively seek patient, supporter and/or customer input to inform our approach and decision-making.
United by the Cause	United by the need <i>to Give Yorkshire More Life to Live</i>

	We are transparent and open in what we do and what we say, uniting to support one another in achieving our shared goals. We collaborate with each other and other organisations We work to build relationships based on trust and collaboration. We seek to understand the needs and objectives of others to establish the common ground and agree how we can work together to benefit people in Yorkshire.
Think Big and Bold	We deliver world-leading research and services We evaluate worldwide research and we test and we learn in order to drive the greatest advances and impact in cancer research and services. We promote a culture of continual improvement and innovation. We dare to think differently to Give Yorkshire More Life To Live We are ambitious and not afraid to try something new or difficult when it comes to achieving our goals. Nor are we afraid to make difficult decisions when they are in the best interests of those we exist to serve; the people of Yorkshire.
Making it Happen	We create and build solutions We are focused on understanding the impact of our work and the difference it is making. We ensure we are always pushing forward the achievement of our charity's vision. We approach our work with positivity, energy and drive We see every challenge as an opportunity to provide a solution. When it comes to preventing, diagnosis and treating cancer, we deliver pioneering solutions <i>To Give Yorkshire More Life To Live</i>. We pursue our goals with enthusiasm and commitment; always asking 'Can I, and can we, do more?'.

YORKSHIRE CANCER RESEARCH

Job Applicant Privacy Notice

Data controller: Yorkshire Cancer Research (the Charity)

As part of any recruitment process, the Charity collects and processes personal data relating to job applicants. The Charity is committed to being transparent about how it collects and uses that data and to meeting its data protection obligations.

What information does the Charity collect?

The Charity collects a range of information about you. This includes but is not limited to:

- your name, address and contact details, including email address and telephone number;
- details of your qualifications, skills, experience and employment history;
- information about your current level of remuneration, including benefit entitlements;
- whether or not you have a disability for which the organisation needs to make reasonable adjustments during the recruitment process;
- information about your entitlement to work in the UK; and
- equal opportunities monitoring information, including information about your ethnic origin, sexual orientation, health and religion or belief.

The Charity collects this information in a variety of ways. For example, data might be contained in application forms, CVs or resumes, obtained from your passport or other identity documents, or collected through interviews or other forms of assessment, including online tests.

The Charity will also collect personal data about you from third parties, such as references supplied by former employers, information from employment background check providers and information from criminal records checks. The Charity will seek information from third parties only once a job offer to you has been made and will inform you that it is doing so.

Data will be stored in a range of different places, including on your application record, in HR management systems and on other IT systems (including email).

Why does the Charity process personal data?

The Charity needs to process data to take steps at your request prior to entering into a contract with you. It also needs to process your data to enter into a contract with you.

In some cases, the Charity needs to process data to ensure that it is complying with its legal obligations. For example, it is required to check a successful applicant's eligibility to work in the UK before employment starts.

The Charity has a legitimate interest in processing personal data during the recruitment process and for keeping records of the process. Processing data from job applicants allows the Charity to manage the recruitment process, assess and confirm a candidate's suitability for employment and decide to whom to offer a job. The Charity may also need to process data from job applicants to respond to and defend against legal claims.

Where the Charity relies on legitimate interests as a reason for processing data, it has considered whether or not those interests are overridden by the rights and freedoms of employees or workers and has concluded that they are not.

The Charity processes health information if it needs to make reasonable adjustments to the recruitment process for candidates who have a disability. This is to carry out its obligations and exercise specific rights in relation to employment.

Where the Charity processes other special categories of data, such as information about ethnic origin, sexual orientation, health or religion or belief, this is for equal opportunities monitoring purposes.

The Charity is obliged to seek information about criminal convictions and offences. Where the Charity seeks this information, it does so because it is necessary for it to carry out its obligations and exercise specific rights in relation to employment.

If your application is unsuccessful, the Charity will keep your personal data on file in case there are future employment opportunities for which you may be suited. The Charity will ask for your consent before it keeps your data for this purpose, and you are free to withdraw your consent at any time.

How we use AI in the recruitment process

We use AI based tools to assist with parts of the recruitment process. The tool may:

- Review applications for matches to essential and desirable criteria
- Analyse key words, skills, qualifications or experience
- Rank or score applications
- Identify where candidates indicate they do not meet essential requirements (e.g., answering 'No' to mandatory questions) and flag such applications for filtering

If the role requires specific mandatory skills or qualifications, the AI tool may:

- Automatically flag or filter candidates who have indicated they do not meet those essential requirements
- Present filtered applications separately for review
- Recommend that such applications do not proceed

A human decision maker will remain involved at all stages of the recruitment process. We do not make final recruitment decisions based solely on AI and the recruitment team examine all AI recommendations before any application is progressed or rejected.

We use AI tools to:

- Increase consistency and fairness in screening
- Manage high volumes of applications efficiently
- Help identify applicants who meet the essential criteria for the role
- Reduce human error and unconscious bias
- Support (but not replace) human decision making

To ensure fairness and protect your rights, we apply the following safeguards to any AI assisted decisions:

- AI outputs are always reviewed by human decision makers
- All candidates may request human intervention or contest AI influenced decisions
- We regularly assess AI tools for accuracy and bias
- We maintain transparency regarding what the tools do and don't do.
- Essential criteria used for filtering are clearly set out in the job description or application form

Who has access to data?

Your information will be shared internally for the purposes of the recruitment process. This includes members of the HR and senior executive teams, interviewers involved in the recruitment process, managers in the Charity's team with the vacancy and IT staff if access to the data is necessary for the performance of their roles.

The Charity will not share your data with third parties, unless your application for employment is successful and it makes you an offer of employment. The Charity will then share your data with former employers to obtain references for you, employment background check providers to obtain necessary background checks and the Disclosure and Barring Service to obtain necessary criminal records checks.

The Charity will not transfer your data outside the United Kingdom.

How does the Charity protect data?

The Charity takes the security of your data seriously. It has internal policies and controls in place to ensure that your data is not lost, accidentally destroyed, misused or disclosed, and is not accessed except by our employees in the proper performance of their duties. The Charity has a Data Protection Policy and an ICT Acceptable Use Policy which apply to all its employees.

For how long does the Charity keep data?

If your application for employment is unsuccessful, the Charity will hold your data on file for 6 months after the end of the relevant recruitment process. If you agree to allow the organisation to keep your personal data on file, the Charity will hold your data on file for a further period of 6 months for consideration for future employment opportunities. At the end of that period or once you withdraw your consent, your data is deleted or destroyed.

If your application for employment is successful, personal data gathered during the recruitment process will be transferred to your personnel file and retained during your employment. The periods for which your data will be held will be provided to you in a new employee privacy statement.

Your rights

As a data subject, you have a number of rights. You can:

- access and obtain a copy of your data on request;
- require the Charity to change incorrect or incomplete data;
- Request human intervention in AI supported decisions;
- Contest an AI assisted decision;
- require the Charity to delete or stop processing your data, for example where the data is no longer necessary for the purposes of processing;
- object to the processing of your data where the Charity is relying on its legitimate interests as the legal ground for processing; and
- ask the Charity to stop processing data for a period if data is inaccurate or there is a dispute about whether or not your interests override the Charity's legitimate grounds for processing data.

If you would like to exercise any of these rights, please contact the Charity's Company Secretary, Joanne Mornin (joanne.mornin@ycr.org.uk)

You can make a subject access request by contacting the Company Secretary.

If you believe that the Charity has not complied with your data protection rights, you can complain to the Information Commissioner.

What if you do not provide personal data?

You are under no statutory or contractual obligation to provide data to the Charity during the recruitment process. However, if you do not provide the information, the Charity may not be able to process your application properly or at all.

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