

## Job Description

<b>Job Title:</b>	Finance Business Partner (Income Generation & Transformation)
<b>Reporting to:</b>	Director of Finance
<b>Location:</b>	Dunfermline Office / Hybrid home based
<b>Salary:</b>	£37,928 - £43,606 per annum (BP8)
<b>Contract Type:</b>	Permanent, Full Time, 35 hours per week

### About the Role

We are seeking a skilled and solutions-focused Finance Business Partner to provide dedicated financial support to the fundraising, marketing and transformation teams. This is a pivotal new role designed to unlock capacity within our teams, improve financial processes and reduce risk by strengthening the connection between these departments.

Reporting to the Director of Finance, you will work collaboratively with colleagues across both finance, fundraising, marketing and transformation, to provide partnering advice and hands on support across everything from budgeting, forecasting, reporting and cost recovery tracking, ensuring we grow income, make planned efficiencies and manage budgets with confidence, accuracy, and transparency. You will act as a trusted advisor and critical friend to the development, brand and engagement leadership team and departmental managers, as well as STAG transformation colleagues.

### Key Responsibilities

#### Financial Planning & Analysis

Partner on the annual budgeting and outer year financial planning process for fundraising, including investment scenario modelling and in-year reforecasting to support strategic decision-making.

Work with fundraising and marketing managers to produce accurate and timely monthly reports, providing analysis of income and expenditure performance against budget, forecast, and historical data.

Develop forecasting models by income stream, including community fundraising, individual giving, trusts, major donors, corporate partnerships, legacies and digital.

Develop and maintain financial models to support analysis of regular giving performance, donor lifetime value, and return on investment across income streams.

Produce high-quality variance analysis and actionable insight to inform fundraising strategy and planning.

Provide insight (such as ROI, LTV, CPA, attrition analysis, payback period modelling) to inform fundraising and marketing investment decisions, channel optimisation, and supporter retention strategies.

#### Restricted & Trust Funding

Support accurate financial planning for restricted funding applications, ensuring full cost recovery is built in to maximise income.

Map and track restricted funds, monitor expenditure against allocations and support reporting back to funders.

Assist with tracking trust and donor-advised funds, supporting income analysis and reconciliation.

### **Legacy Finance**

Collaborate with the legacy team to monitor pipeline income, track receivables and provide analysis and projections for gifts in wills.

Ensure that legacy income is accurately recorded and appropriately reported in line with SORP and internal controls.

Oversee the delivery of financial legacy administration duties by finance colleagues.

### **Process & Governance**

Identify, streamline and automate inefficient or manual financial processes.

Improve income reconciliation between finance systems and fundraising platforms.

Monitor and ensure compliance on payment platforms and fundraising integrations.

Work with Finance to ensure systems are up to date and support fundraising operations.

Support accurate reconciliation and reporting of Gift Aid income, ensuring claims are maximised and compliant with HMRC guidelines.

### **Business Partnering & Collaboration**

Act as a trusted partner to the development, brand and engagement leadership team and departmental managers, advising on financial implications of initiatives.

Facilitate communication between finance, fundraising and marketing, ensuring shared understanding and aligned priorities.

Identify financial risks and provide recommendations to mitigate them across activities.

Contribute to fundraising and marketing strategies and investment decisions with financial modelling and insight.

### **Financial Reporting**

Working with the Management Accountant, support income preparation of the monthly management accounts, in line with the appropriate accounting policies and deadlines.

work with the Head of Finance in the income preparation of annual accounts for the Society and its subsidiary.

work with the Head of Finance throughout the annual external audit process and engage with the Auditors directly as required.

## **Transformation Partnering**

Act as the primary finance partner to Transformation programme leaders providing robust financial insight, challenge, and guidance to ensure delivery of programme benefits and objectives, within budget.

Lead on the development, monitoring, and reporting of programme budgets, forecasts, and financial models, ensuring alignment with strategic priorities and transformation milestones.

Support business case development for transformation initiatives, including detailed financial analysis, cost-benefit evaluations, and risk assessment.

Provide financial challenge to proposed projects and change initiatives to ensure value for money and long-term sustainability.

Prepare high-quality financial reports, dashboards, and presentations for senior leadership, programme boards, and other stakeholders.

Collaborate with programme and project managers, operational leads, and finance colleagues to track programme spend, identify variances, and agree corrective actions.

Monitor realisation of benefits from transformation projects, working with stakeholders to measure and report on both financial and non-financial outcomes.

Drive improvements in financial processes, controls, and reporting to support effective programme delivery and governance.

Act as a trusted advisor, influencing decision-making through clear communication of financial implications and strategic options.

Ensure compliance with organisational financial policies, governance standards, and relevant regulatory requirements.

## **Person Specification**

### **Knowledge, Skills & Experience**

Qualified/part qualified accountant or qualified by experience.

Demonstrable experience working in a finance business partnering capacity, ideally within the charity sector.

Understanding of charity finance is preferable, including restricted funding and SORP.

Experience building and maintaining budgeting and forecasting tools.

Excellent Excel skills and experience working with CRM/donation and financial systems.

Strong analytical and problem-solving ability.

Experience supporting legacy income or gifts in wills desirable.

**Competencies**

Excellent interpersonal and communication skills — able to translate complex financial concepts into practical insight.

Strong collaboration skills and ability to manage cross-functional relationships.

Proactive, organised, and able to manage competing priorities.

Committed to continuous improvement and operational excellence.

Aligned with our organisational values and mission to improve animal welfare.