

Candidate Pack

Role: Finance Analyst



British Heart
Foundation

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Appointment of Finance Analyst



Dear Candidate,

Thank you for your interest in our role of Finance Analyst at British Heart Foundation (BHF).

It is my privilege to lead the Finance, Risk, Planning & Legal team for one of the UK's largest charities and the nation's leading independent funder of heart and circulatory disease research.

Our vision is a world free from the fear of heart and circulatory diseases. A world where fewer hearts stop without warning and more of us can live well for longer with the people we love.

We know achieving this won't be easy. But thanks to decades of discovery and scientific advances – we are more confident than ever.

Together, we believe we can stop the devastation for the millions affected by these conditions. All it takes is passionate people like you standing alongside us and believing in the power of research to create a better, brighter, healthier world for everyone.

As Finance Analyst you'll report to the Senior Finance Analyst (SFA) for Charitable Mission and Support Functions, with the focus on advising and supporting staff in each function, ensuring financial results and plans are accurate and fit for purpose, as well as providing the financial support needed for effective decision-making.

We want an exceptional colleague who exemplifies and champions our values; brave, informed, compassionate and driven. It's an incredibly exciting time to be part of our team. We are more ambitious and determined than ever – because the potential cures and treatments we need are in sight. You could be part of getting us there sooner, so thank you for your interest.

BHF is also proud that we are working towards being a truly diverse organisation, with an Equality, Diversity and Inclusion (EDI) strategy, Igniting Change, setting out a roadmap of changes with want to see. Our growing commitment to equality, diversity and inclusion spans across our organisation and we pride ourselves on being an inclusive employer who puts diversity at the heart of everything that we do.

So, if you feel you have the skills and experience that we are looking for, and you share our determination to help fund lifesaving research, then we would be delighted to hear from you.

Martin Miles
Chief Financial Officer



About us

There is nothing more precious than our hearts. But millions of people's hearts in the UK are vulnerable and need our help. British Heart Foundation (BHF)'s mission is to raise money to fund research that saves and improves lives and supports people affected by heart and circulatory diseases.

For over 60 years we've been a leading independent funder of research into heart and circulatory diseases. We are the UK's largest charity retailer with around 700 stores, an employee base of over 4,000, supported by a further 18,000 volunteers.

With over £430 million of BHF-funded research in progress, we have an aspiration to invest in excess of £1 billion in research by 2030.

We have so much to be proud of. But we know we're just scratching the surface of our true potential. And the challenges we face are as grave as ever.

There is nothing more precious than our hearts. But the tragic reality is that millions of people's hearts are at risk. Mounting numbers of people

face an agonising wait for care, while many more live in hope of treatments and cures that could save or improve their lives.

At the same time, the researchers we fund really are making science fiction a lifesaving reality. From our CureHeart programme, which offers hope of a cure to 30 million people worldwide with an inherited heart muscle disease for the first time in history, to using data science and artificial intelligence (AI) to predict heart attacks before they even happen, we're proud to be backing transformational research that is changing the world.

However, we need your support. By joining BHF, you could help us bring hope to people living with heart and circulatory diseases in the UK.

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CPR and heart surgery saved my life when I was six. Research made that happen."

Jadyn Briggs



Being a responsible charity

We've continued our journey to become a more socially, environmentally and financially sustainable organisation.

Our mission is to save and improve the lives of people affected by heart and circulatory diseases. We raise money to fund research to find cures and develop treatments for the world's biggest killers. And we are determined to do this in a responsible way.

Links between environmental factors and heart and circulatory diseases are clear. Research shows that extreme weather, such as intense heat and cold, have negative impacts on people living with these conditions.

We see it as a key part of our core purpose – to make sure that we carry out our lifesaving work in a responsible way. Our progress this year has included setting our commitment to be a net zero organisation by 2045, at the latest.

This covers all areas of our activities, from direct emissions, such as the heating we use in our BHF offices and stores, to the much more significant indirect emissions from within our supply chain through to how the research we fund is undertaken.

This year we have focused our work on mapping BHF's full carbon footprint. This gives us a detailed view of where and how we can make the most impact to reduce our impact.

Our roadmap to net zero has six key areas for initial focus:

- energy efficient and zero emission buildings
- zero emissions transport
- product sourcing and suppliers
- travel and logistics
- waste and circular economy
- research funding.

These commitments form an ambitious roadmap to be an ever more responsible organisation to our planet and our people.

Sometimes the research we fund may involve animals; this isn't something we take lightly and you can read more about our commitments in research [here](#).



Our strategy to 2030

Rising to unprecedented challenges

We are on a mission to protect all our hearts, so no one has to live in fear of heart and circulatory diseases.

Our strategy to 2030 has guided us in making this impact. It sets out the changes we want to see in the world by 2030, and how our work will help us achieve them.

Our vision

A world where everyone has a healthier heart for longer

Our goals

What we're trying to achieve

Stop

Stop heart disease before it starts



Save

Save more lives from heart disease



Support

Support everyone with heart disease to live a longer healthier life



Our priorities

How we'll achieve it

Inspire

Inspire support and income to power lifesaving research



Advance

Advance the scale, breadth and impact of cardiovascular research



Transform

Transform the information, care and support available to all people affected by heart conditions



Accelerate

Accelerate impact by unlocking the potential of our people, technology and culture



Funding research to save and improve lives

Cutting-edge technologies – such as artificial intelligence (AI), gene editing and regenerative medicine – hold the potential for rapid and transformational advances in how we prevent, treat and cure heart and circulatory diseases. We will continue to fund world class research to save and improve lives, focusing on:

Helping the cardiovascular research ecosystem recover and grow by:

progressing our ambitions around equality, diversity and inclusion (EDI) in cardiovascular research, by driving forward our Women in Science programme and undertaking a comprehensive assessment of the CVD research workforce in the UK

Enhancing knowledge of cardiovascular diseases, through:

- Implementing partnership initiatives to seize new opportunities and address unmet need, including the BHF-UK Dementia Research Institute Centre for Vascular Dementia Research and the BHF-MRC Centre of Research Excellence to turbo charge our investment in regenerative medicine.
- A 60-year track-record of lifesaving breakthroughs. We will take the opportunity to invest in transformational science and innovation on a global scale, funding the world class research that will save and improve lives.

Seeing more BHF-funded research discoveries being translated into patient and public benefit by:

continuing to implement and refine our research translation strategy to increase the commercial exposure and translation of BHF-funded research towards patient benefit.

We want more people to survive a heart attack

5

Every five minutes someone is admitted to a UK hospital due to a heart attack



Better health and care

People with heart disease need us more than ever as we're faced with the biggest heart care crisis in living memory. Our continued focus on ensuring people get the information, care and support they need will be accelerated by:

Increasing people's chances of surviving out-of-hospital cardiac arrest (OHCA) by:

- Increasing the use of revivr in schools and developing a community and youth group based package, aiming to increase the number of people trained in CPR.
- Securing a long-term funding model for the circuit to provide sustainability and momentum.
- Refining our fully funded defibrillator programme that aims to place defibrillators in areas most in need to improve equity in access and give more people a better chance of surviving an ohca.

Helping more people to manage their heart or circulatory condition by:

- Continuing to ensure bhf is meeting patient requirements when we are needed most – optimising our support offer, marketing our offer, and integrating bhf content into health systems and settings.
- Exploring how we can gather insights to inform our work from a wider range of people affected by heart and circulatory diseases in a more sustainable and inclusive way.

Supporting people to reduce their risk of heart and circulatory diseases by:

- Exploring bhf's aspirations and goals in preventing heart and circulatory diseases as part of a strategy review and refresh.

We want everyone to know their numbers

5

As many as 5 million people are living with undiagnosed high blood pressure in the UK



Grow support and income

By being clear on where we lead, where we partner, and what we don't do, we can make an even bigger impact for people living with heart and circulatory diseases. We will continue to focus our attention on raising awareness of our mission and raising funds to power lifesaving research by:

Generating more fundraising income, including an increased proportion from high value audiences:

- Continuing our 'this is science' brand activity, including in the devolved nations.
- Introducing content to help people better understand our cause and our urgent need for support.
- Drive incremental philanthropic income, by developing a clearer articulation of our strategic research objectives.

Generating more income from our commercial operations, with an increased proportion from online retail by:

- Continuing to roll out our shop and store opening programme and refresh of the estate, enhancing our technology in our shops and stores to improve the customer experience and increase income.
- Driving online growth across our own online shop and third party platforms (e.G. Ebay) including improvements to the customer experience (payments, stock journey) and to the underlying operations.
- Continuing the rollout of myvan – our integrated customer facing logistics solution focused on stock delivery and collection.
- Continuing to grow our commercial footprint through corporate defibrillator and health at work partnerships.

Ensuring our supporters have an outstanding experience by:

- Transforming our communications for retained customers to improve lifetime customer value, by telling our brand story and using 'reasons to believe' to demonstrate our impact.
- Delivering our website transformation programme –improving the user experience and serving appropriate donate/sign-up calls to action across relevant pages and journeys.

We want to tackle vascular dementia

14000

Vascular dementia causes around 14,000 deaths each year in the UK. People with a family history of coronary heart disease are significantly more likely to develop vascular dementia



Striving for excellence

We strive to be bolder, braver, and have a single-minded focus on what will make the biggest difference for families affected by heart and circulatory diseases. By working together, we can inspire support, accelerate breakthroughs and save more lives than ever before, with focus on these key areas to drive our performance:

- Agree the skills, capabilities and talent bnf needs to thrive in the future (through our future fit programme).
- Embed a 'continuous improvement' mindset throughout the organisation, applying simple but effective methods to solve problems and take small, incremental steps to transform how we work.
- Advance our work on creating a holistic employee value proposition, by optimising our benefits, rewards, working arrangements, learning and career opportunities.
- Embedding further our vision for an easier, more inclusive experience for all our colleagues and volunteers; through our wellbeing offer, progressing our edi strategy, and ensuring the bnf is a safe workplace for all.
- Progressing the enterprise foundations multi-year programme to design and implement effective and resilient core technology and data infrastructure.
- Strengthening our ability to protect, detect, manage and monitor information security threats.
- Growing awareness, safe-usage and application of ai by delivering against our ai strategy roadmap to improve access, guardrails, support and the sharing of learning amongst colleague.
- Implementing and communicating activities in our environmental, social and governance (esg) roadmap to achieve our aim of being a net zero organisation by 2045 at the latest.

We want every child born with a heart condition to lead a long and healthy life

13

Every day, around 13 babies are diagnosed with a heart condition in the UK



Belonging

Our push for equality, diversity and inclusion takes many forms, including how we manage our organisation, and how our research funding helps to tackle health inequalities.

An important starting point is making sure BHF's workforce reflects the general population so we can better represent the experiences and voices of the communities we support. A more diverse, inclusive, and fair BHF will not only improve the quality of what we do, but the impact we have.

The ongoing work of Kaleidoscope, our equality, diversity and inclusion group, as well as our Research Inequalities Working Group, demonstrate our commitments to improve equality, diversity and inclusion for our staff, volunteers, and supporters, as well as our funding activities.

We want all of our BHF colleagues to have development and progression opportunities, and to embed a more inclusive culture throughout our organisation. Our EDI strategy, Igniting Change, sets out our roadmap of the changes we want to see.

Our Kaleidoscope group is made up of representatives from across the organisation. Our activities encompass accessibility to work and progression for those with care responsibilities, working parents, those with disabilities and long term health conditions, different age groups, those from underrepresented ethnic backgrounds, LGBTQ+ individuals and many more forms of diversity, both visible and invisible.

We have a number of affinity groups within the organisation. These include spaces for working parents, individuals from different religious, racial, and ethnic backgrounds, members of the LGBTQ+ community and those with disabilities and long term health conditions. These are designed to be spaces for colleagues to feel connected, included and heard.

We want to fund lifesaving research for everyone. We can help to achieve this by welcoming colleagues from all backgrounds to come and be part of our BHF family.



Building an inclusive and supportive environment

Many heart and circulatory diseases are diseases of inequality. Our equality, diversity and inclusion (EDI) strategy, Igniting Change, recognises that everyone's circumstances are unique. We are committed to funding lifesaving research for everyone, and we are committed to being an inclusive employer.

Whilst working at BHF, we actively encourage our colleagues to feel safe to bring their true selves to work. We strive to create a culture where colleagues are inquisitive about diversity and keen to get involved in all activities which make individuality and inclusivity part of what we do every single day

Improving diversity in research

Making the world a fairer place is an important goal, one that we are proud to contribute to by tackling inequalities in cardiovascular health, improving the diversity of our research workforce, and making BHF a more inclusive place to work. We want to have achieved greater inclusivity in the funding and the design of research, as well as in the cardiovascular research community. We have focused on collating data that defines our starting point, so we can take the right action to improve diversity.

We've published our first research funding diversity report. The report provided valuable insight that is helping us shape our future actions to address under-representation in our research community.



Staff engagement

Listening to our colleagues, and understanding what matters, is always the first step in improving the employee experience.

Our highest scoring areas in the latest colleague engagement survey were goal setting, fair treatment, responding appropriately to instances of discrimination and that BHF has created an environment where people of diverse backgrounds can succeed.

Heartfest

In June 2022 we held our first ever Heartfest, an online festival that brought BHF colleagues together to celebrate our work and give everyone a chance to reconnect with each other and to our cause.

Heartfest has since been a yearly event, growing each year and incorporating both online and in person events at BHF offices and shops across the UK.

Celebrating Pride

Pride is a chance for us to learn and show support for the LGBTQ+ community. BHF colleagues have taken part in Pride events across the country since 2018, including Pride marches in Edinburgh, Cardiff, Belfast and London.

Wellbeing

We take immense pride in fostering an environment that prioritizes the health, safety, and wellbeing of our employees, volunteers, and customers. Our excellence in health, safety and wellbeing is about cultivating a culture where every individual feels valued and safe, and our commitment to creating a safe and healthy workspace has been recognized nationally, culminating in the prestigious ROSPA Gold Award we proudly received in 2023.

One of our standout initiatives is the “Live Well Work Well” project group, which plays a pivotal role in enhancing workplace wellbeing. This group organizes a myriad of activities and resources aimed at promoting and supporting mental, physical, social and financial health. At BHF, we believe that a safe and healthy workplace is the foundation of success. As we continue to innovate and grow, our commitment to health, safety, and wellbeing remains unwavering. Join us and be a part of an organization that not only values your professional contributions but also cares deeply about your overall wellbeing.

A flexibly connected organisation

Our flexibly connected programme allows colleagues based outside of shops and stores to work flexibly, in a way that helps unlock their best work for the cause. The programme has been engaging with our Champions network, gathering insights from colleagues through our Ways of Working Study, to continuously adapt the approach where needed. It was awarded the Best Flexible Working Strategy at the HR Excellence Awards.

Join us at BHF and be part of a team that truly cares about your wellbeing. Together, we can make a difference in the fight against heart disease while supporting each other every step of the way.



Our values

We are proud that the work we do is funding groundbreaking, lifesaving research that one day could see a world free from the fear of heart and circulatory diseases, including conditions such as heart attacks, stroke and vascular dementia.

That's why our values are key to defining who we are, how we do things and how we can achieve our ambitions so that every pound we raise funds the research that keeps millions of hearts beating.



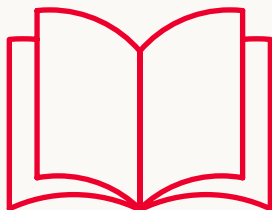
Brave

We speak out.
We're decisive.
We're innovative.



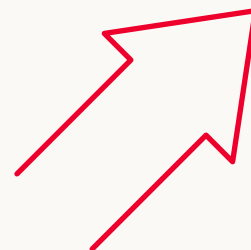
Compassionate

We're open and honest.
We respect others.
We care.



Informed

We're clear.
We're open minded.
We're work together.



Driven

We're focused.
We're determined.
We keep learning.

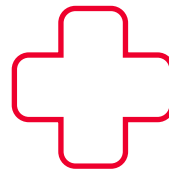
Our benefits

We all achieve more together when we're happy and healthy. As a world class organisation, we offer competitive salaries and an attractive package of benefits, designed to support the health and wellbeing of everyone who works here. Our generous benefits include:



Annual leave

Our annual leave allowance of 30 days plus bank holidays is among the best in the sector.



Health care

We offer employees private healthcare, dental health cover and a contribution towards your gym membership.



Family care

We offer 12-weeks' pay package for all family leave including maternity, paternity, adoption and neonatal care leave and are committed to offering returning parents and guardians the opportunity to work flexibly.



Live well. Work well.

Heart health is central to our mission, and that starts with you. We provide a programme of activities, opportunities and guidance to inspire and support you to live a healthy and happy life, at home and at work.



Support leave

We offer a holistic support leave of up to 10 days leave to support colleagues in time of uncertainty, where you may need to take additional time away from work to support yourself or others during a life event, such as caring



Pensions

Our generous pension scheme will support you to save for your retirement. You can contribute a minimum of 3% but can increase this to 8% or more, with employer contribution starting at 5% and increasing to a maximum of 10%.

Job description



Job title	Finance Analyst, Charitable Mission and Support Functions (CM&SSP)		
Directorate	Finance, Risk, Planning & Legal		
Team	Finance Business Partnering		
Reporting to	Senior Finance Analyst	No. of direct reports	0
Agility contract type	Hybrid - London office and Home		
Location	Greater London House, NW1 7AW		
Budget responsibility	N/A		
Job level	5	Date	July 2025

Role Summary

The British Heart Foundation's Medical directorate (Research and Healthcare Innovation) and Support Functions (People, Finance, Technology and Strategy) have annual expenditure of c£120m and c£50m respectively. Comprising many diverse areas, it is a complex remit of directorates with 500+ staff and many cross-organisational activities while operating in a constantly changing environment. Spread over at least 70 cost centres, its objectives also include regular engagement with the Retail directorate on Enabling expenditure and the Marketing, Fundraising and Engagement (MFE) directorate regarding restricted income and marketing activity which directly impacts BHF's Charitable Mission.

With an exciting remit of supporting and challenging the Medical and Support Function directorates, the breadth of finance focus activities include research, project analysis, continuous improvement and cost reviews, amongst others. Working closely with staff from each directorate as well as the Finance Planning and Reporting and Financial Control teams, this role will play a key part in delivering the financial analysis and commentary, support and insight and stakeholder management to help budget holders deliver their objectives.

The role will report to the Senior Finance Analyst (SFA) for Charitable Mission and Support Functions, with the focus on advising and supporting staff in each function, ensuring financial results and plans are accurate and fit for purpose, as well as providing the financial support needed for effective decision-making.

Key responsibilities



Period Reporting

- Review monthly results to ensure accurate management accounts, arranging for corrections as needed. Ensure individual management accounts reports meet the needs of users, whilst making best use of tools.
- Work closely with Heads of Dept to identify and explain key variances within agreed timeframe.
- Preparation of suitable management accounts commentary.
- Production and distribution of KPI dashboards as required to agreed timescales. Ensure dashboards are robust, accurate, "living" documents.
- Take a lead role in development of dashboards and other reports to best support the needs of the business.

Financial Planning

- Guide and support Directorate staff to deliver accurate Forecasts, Budgets and High-Level Plans to agreed timescales, advising and supporting Heads of Dept. and other staff, ensuring the outputs are robust and the needs of both finance and the directorate management teams are met. Be familiar with all the numbers in the areas supported.
- Work closely with the SFA and FBP to review and agree assumptions with stakeholders.
- Identify relevant issues for discussion and challenge with SFA/Finance Business Partner/Heads of Department.
- Provide appropriate training and support to the Directorate staff to successfully guide them through the planning processes while being familiar with critical dates and tasks.
- Support the SFA to achieve agreement of plans with both Financial Planning & Analysis team and Directorate Directors.
- Work with Heads of Department to ensure there is buy-in to all planning processes, maintaining close communication with the Finance Planning team to ensure local needs are considered and met by their organisation-wide processes.

Management

- Provide both financial support and challenge to business decisions and operational initiatives with reference to appropriate analysis and business case evaluations.
- Resolve day to day financial problems, referring to SFA or wider finance network for support.
- Ensure stakeholders understand the full implications of financial results, developing further analysis where necessary to provide useful insight.
- Be proactive in developing useful, insightful analysis and reports, challenge existing processes and activities where appropriate.
- Be familiar with the risks associated with each directorate's plans and forecasts, using prior knowledge to support and challenge.
- Look for opportunity to maximise value and minimise cost when advising colleagues.
- Maintain good connections with Finance colleagues to ensure familiarity with issues and changes that may affect supported stakeholders.
- Provide appropriate training to CM&SSP staff to ensure they are confident in understanding and fulfilling their financial responsibilities.

Knowledge, training and qualifications



- Part qualified CCAB or CIMA accountant or qualified by experience.

Experience

- Experience of management accounting/reporting, forecasting, budgeting and analysis
- Experience of working in a large organisation preferably in a commercial environment (desirable)

Skills and attributes



- Strong analytical skills and attention to detail
- Strong relationship skills, quickly building lasting links with key stakeholders in the organisation
- Understanding of risk and ability to identify risks and omissions in planning
- Intellectually curious and challenging
- Able to provide objective advice and persuade and influence staff at all levels
- A positive 'can do' attitude
- Able to use own initiative, who can work without close supervision
- Intermediate Microsoft Excel skills
- Strong communication skills, able to liaise with colleagues at all levels of the organisation

Safeguarding

At British Heart Foundation (BHF), we are committed to creating a safe and rewarding environment for all of our people to work and volunteer. This means we have a robust safeguarding policy to ensure everyone is treated properly, and a whistle blowing service so people can raise any concerns they have confidentially.

Data protection

No personal data access:

During your employment this role will not encounter any personal data. If you find yourself with access to personal data you are not authorised to have, you must report it to your line manager and the IT Service Desk immediately.

How to apply



To apply for this role please use the apply button via the jobs page on our website. Our process involves submitting your CV and a supporting statement, which should outline your interest and explain how you meet the criteria stated in the person specification.

All applications are managed by our Recruitment team. If you wish to speak with a member of the team regarding the role and your application please contact them on careers@bhf.org.uk

Early application is encouraged as we will review applications throughout the advertising period and reserve the right to close the advert early should we receive a sufficient number of applications.

Should you need any adjustments to the recruitment process at application stage please contact the Recruitment team on careers@bhf.org.uk





**British Heart
Foundation**