JOB DESCRIPTION

Job Title: Head of Finance Change

Grade: E

Department: Finance

Main purpose of job:

This role will be responsible for the management and execution of Finance change including: MI development, GL implementation, Treasury systems, Operation system development and upgrades. Liaising with teams both internally within the Bank and the CAF parent and externally with third party providers, the role will ensure that the Finance change agenda progresses in line with target timelines and key milestones.

The role will be responsible both for planning and managing the execution of the Finance change agenda and for reporting on progress and issues in a timely manner to the Chief Financial Officer. The role will also develop and industrialise appropriate MI that aids decision-making and governance.

Certification Regime: Not applicable

Responsible to: Chief Financial Officer

Key Job Responsibilities:

- Finance and related MI
  - Management of Finance MI and data mining activities and upskilling of line staff
  - Work with Technology, Finance and Executive management to develop and build MI requirements, using existing Operations/reporting platforms and planned MI "Ecosystem"
- Sage GL delivery and interface with Transact
- Delivery of Finance change and ad hoc technology requests eg HMRC BBSI reporting
- Delivery of Lending migration
- Regulatory Reporting system review and implementation
- Treasury system review and implementation
- Hands-on user testing for all of the above.
- Finance ownership of Critical Spreadsheet Control Framework application and updates.
- Finance ownership of Role Based Access Controls (RBAC) reviews and updates.

Dated: July 2026

CAF
Charities Aid Foundation

PERSON SPECIFICATION

Job title: Finance Change Manager

Date: June 2026

Attributes *	Essential ✓	Desirable ✓	How Evidenced†
Experience			
• Finance, Treasury & MI systems	✓		A/C
• Links to upstream Operations platforms	✓		A/C
• Financial and prudential risk reporting processes	✓		A/C
• Data mining and analysis	✓		A/C
• GL implementation	✓		A/C
• Ideally knowledge of Transact		✓	A/C
• Operate with Executive management on strategic technology and MI matters	✓		
Qualifications			
• Ideally Qualified Accountant	✓		A/E
Training			
• High technical competence in MI and data analysis	✓		A/C
Specialist Skills/ Ability/Knowledge			
• Finance reporting	✓		A/C
• Finance technology and links to upstream platforms	✓		A/C
• Data analysis, MI and technology development skills	✓		A/C
Communication			
• Ability to communicate technical technology and data management matters to all levels in a transparent manner	✓		A/C
Personal Qualities			
• Ability to work in diverse environment and to embrace learning and change.	✓		C
• Flexible approach to changing priorities.	✓		C
• Ability to work to deadlines.	✓		C
Prior to Appointment			
All posts:			
• Credit Check	✓		R/E
• Dow Jones Check	✓		R/E
• Basic DBS Check	✓		R/E
• Employment References	✓		R/E
• Medical Clearance	✓		R/E
• Right to Work in the UK	✓		R/E
*FCA Approved Posts:			
• Standard Criminal Records Check	✓		R/E

<u>Key</u>
R = References, **E** = Evidence/Certificates, **A** = Application, **C** = Competency Interview, **T** = Testing/Assessment