



JOB DESCRIPTION

JOB TITLE:	FINANCE BUSINESS PARTNER
ACADEMY:	TRUST-WIDE
GRADE:	GRADE 8 – SCP 32-36
RESPONSIBLE TO:	SENIOR FINANCE BUSINESS PARTNER

<p>JOB PURPOSE:</p> <p>The Finance Business Partner is a key member of the Trust finance team, providing professional management of financial services across the academies of The Harmony Trust.</p> <p>The post holder is responsible for:</p> <ul style="list-style-type: none">○ delivering operational compliance with the Trust’s Finance policy, procedures and statutory requirements○ the management and operation of the accounting and budgeting systems, monitoring and reporting on financial performance for a portfolio of Trust establishments○ the provision of accurate and timely specialist/technical financial advice to Trust Leaders and other Trust colleagues to enable the Trust to make the best use of its financial resources○ providing training, coaching and mentoring to finance and non-finance colleagues
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KEY RESPONSIBILITIES	
Financial Management	
	Ensure that the finance and audit requirements outlined within the Academies Trust Handbook, Trust Financial Policies and Scheme of Delegation are fully met through the effective establishment, maintenance and development of key processes and procedures
	Provide support with day-to-day activities including working with and in our academies. This may include being involved in due-diligence exercises and conversion projects of schools joining the Trust
	Contribute to the on-going development and maintenance of the Trust’s financial management systems.
	Provide oversight, training, support and guidance to individual academy in the individual academies
	Maximise efficiency in the use of financial resources, ensuring value for money is achieved, budgets are accurately set and effectively monitored, and procedures are adhered to
	Responsibility for the preparation and review of monthly management accounts and monitoring reports for the academy leadership team, resolving any issues and reporting any variances / concerns to the Trust Leader/Senior Finance Business Partner
	To ensure all monthly processes within the operating timetable are completed within specified timescales, including:



	<ul style="list-style-type: none"> • Month-end accruals, prepayments, accrued income, deferred income • Identify fixed assets purchased during the month and ensure that they have been capitalised • Post payroll into the accounting system • Schedule and post depreciation for the month • Review aged debtors/aged creditors, identify potential problems and post adjustments accordingly • Prepare monthly reconciliations for all balance sheet accounts • Review outstanding commitments report to ensure that obsolete purchase orders are removed from the system • upload of journals to the finance system • preparation of variance analysis
	Support the academies to maximise income generation within the ethos of the Trust
	Support the academy with the implementation of arrangements of the academy facilities including lettings, extra-curricular activities, and other ad-hoc serviced
	To be responsible for the management of the academy accounting function, ensuring its efficient operation according to trust policies and agreed procedures
Budget Management	
	To play a key role in budget planning, preparing draft estimates of annual income and expenditure for academies and supporting the preparation of the Trust annual budget in line with the Medium-Term Financial Strategy and approved Reserves policy
	To ensure academy budgets are regularly monitored and challenged
	Support academy leaders by providing advice and guidance and identifying economies and efficiencies to always ensure a balanced budget
	To maintain pupil number projections for each academy, highlighting any issues such as falling rolls or changes within budget expectations
	To use benchmarking and other financial management information such as CLFP (Curriculum Led Financial Planning) to assess trends and review the financial efficiency of the academy
Fixed Assets	
	Maintain a comprehensive fixed asset register, reconciling both the physical asset and financial records
	Ensure depreciation is calculated and processed in line with month end procedures
Reporting, compliance and stakeholder management	
	To provide advice and support to the academy leaders and other member of the Trust Leadership Team on all matters of a financial nature
	Assist in the preparation of statutory returns and financial statements
	To adhere to all reporting timescale requirements



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	To meet regularly with academy leaders and other colleagues to discuss current financial forecasts, variances to budgets and all other finance related matters
	To prepare and present Key Performance Indicators (KPI's) to support and advise academy leaders on budget and financial performance
Payroll	
	To monitor the monthly payroll for named academies and reconcile all variances within the month they occur
	Complete checks of payroll preliminary reports within the required timescales
	Input payroll journals to the accounting system
Audit	
	To assist in the preparation of the working paper files for the production of the annual accounts and annual audit
	To liaise with the auditors as appropriate and ensure the actions from Internal and External Audit action plans are implemented at academy level
Census	
	Responsibility for the accurate and timely submission of the academy census ensuring funding for the academy is always maximised
	Support academy colleagues to resolve queries relating to census submission
	Support with training and development for census completion
Other	
	Lead responsibility for the management of the claims process at academy level, including compliance with all insurance policy requirements
	To prepare costings and business plans for specific projects to support the future development of the academy
	Be the point of contact with central and other agencies regarding grant applications, gifts and other donations
	To assist with the standardisation of procedures and in developing a suit of procedural notes for all finance tasks, for the Trust and its individual academies
	To prepare ad-hoc financial returns for external agencies within statutory deadlines
	To support the Trust Procurement strategy by championing economy, efficiency and effectiveness throughout Trust academies and ensuring the contracts register is always upto date

Chief Executive: Mr Antony Hughes

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	To explore opportunities for the Trust to retender for goods and services to achieve best value
	Where required, to negotiate, manage and monitor contracts, tenders and agreements for the provision of goods and services
	To take the lead on/contribute to Trust wide initiatives and project work as appropriate
	To promote the finance function of the Trust in order that procedures become firmly embedded in the day to day activity of the academy
	Contribute to the sharing of good practice with others and access appropriate and ongoing CPD

STANDARD DUTIES

1. To understand the importance of inclusion, equality and diversity, both when working with pupils and with colleagues, and to promote equal opportunities for all.
2. To uphold and promote the values and the ethos of the Trust.
3. To implement and uphold the policies, procedures and codes of practice of the Trust.
4. To take a pro-active approach to safeguarding and health and safety, working with others to minimise and mitigate potential hazards and risks, and actively contribute to the security of the academy e.g. challenging a stranger on the premises.
5. To participate and engage with workplace learning and development opportunities to continually improve own performance and that of the team/school.
6. To attend and participate in relevant meetings as appropriate.
7. To undertake any other additional duties commensurate with the grade of the post.
8. Ensure compliance with GDPR for activities undertaken within the role, ensure other staff also conform with this requirement

SPECIAL CONDITIONS:

The post holder will be office-based working with other members of the Finance team at a named academy located in either the North West or Derby hub area.

There is a requirement to work on-site for a minimum of 3 days per week. Two days are to be spent working alongside the Finance team to develop a strong team culture, share information and develop systems and processes ensuring cohesion and consistency across all finance functions. One day per week is to be spent working from an academy within your responsibility. This is to support academy leaders and to strengthen/develop processes across the finance and administration functions.

Enhanced DBS Disclosure is required

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PERSON SPECIFICATION

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Experience, Training and Qualifications	Essential/Desirable
AAT Level 4 Diploma in Accounting or equivalent	E
CCAB qualified or equivalent	D
A minimum of 3 years' experience working within a busy finance department	E
Experience of working within the education sector finance department	D
Proficient in the use of financial database systems	E
Experienced in Access Financial and Budgeting systems	D
Excellent IT skills, advanced in Excel and a good working knowledge of Microsoft Office	E
Proven experience in producing management accounts, including cash forecasts and balance sheet reconciliations	E
Proven experience in supporting year end and other audit processes	D
Experience of budget planning, management and monitoring	E
Knowledge, Skills and Abilities	
Familiar with all aspects of Company accounts, statutory requirements and Charities SORP	E
Awareness of legislation and funding relating to MATs and their academies	D
Knowledge of the requirements of the DfE Academies Trust Handbook and Annual Accounts Direction.	D
Ability to work as part of a team	E

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Ability to produce management and statistical information clearly in a way that can be understood by others	E
Effective written and verbal communication skills appropriate for a range of different audiences, including skills where appropriate in being persuasive, encouraging and negotiating, in order to further the objectives of the Trust	E
High levels of accuracy with strong attention to detail	E
Proactive in your approach to improving processes and introducing efficient effective systems	E
Excellent organisational skills with the ability to work at pace, multitask and prioritise	E
Understanding of why safeguarding is important in a school environment	E
Understanding of equal opportunities and inclusion in a school setting and how it applies	E
Commitment & understanding of General Data Protection Regulations and how they would apply in the organisation and within the role	E
Personal Qualities	
Able to work flexibly as the workload demands	E
Committed to continuing personal professional development	E
Personal commitment to ensure services are equally accessible and appropriate to diverse needs	E
Able to maintain issues of confidentiality within the working environment	E
A resilient and inclusive team worker able to always portray a professional and approachable demeanour	E
Willing to travel to locations and sites within the Trust's portfolio of academies	E
Willing to consent to apply for an enhanced DBS with barred list check.	E

NB. - Any candidate with a disability who meets the essential criteria will be guaranteed an interview