

Job Description

Post Title:	Finance Business Partner
Post Grading:	Grade 10, SCP 31 to SCP 34 £45,718 - £48,710 Pro rata to £37,069 - £39,495
Hours	30 hours a week, 52 weeks a year
Responsible to:	Chief Financial Officer

Overall Purpose of this Post:

To provide high quality support and expertise setting and managing the budgeting and forecasting of allocated academies across the Trust, supporting leadership teams, local governing bodies, and the Trust to achieve excellent school resource management. To support with Trust wide budgeting and consolidation of financial information, ensuring consistency and accuracy.

Major Objectives:

These will include, as appropriate, those that reflect the Trust's key value: "Winning Hearts, Inspiring Minds" through Collaboration, Inspiration, Diversity and Community.

1. To develop a deep understanding of the individual academies, their unique needs, and the shared Trust wide services and resources, ensuring that recommendations support these and always underpin the ethos and culture of the Trust and its long-term strategies.
2. To work with the Chief Financial Officer, senior leaders, and budget holders to prepare annual academy budgets and 5-year forecasts which allocate resources to positively impact educational outcomes and effectively best meet pupils needs.
3. To prepare monthly budget monitoring reports which provide variance analysis and commentary on financial performance and monthly update full year financial forecasts. Building strong relationships with budget holders to ensure highly effective budget management.
4. To ensure that Integrated Curriculum Financial Planning is an integral part of the Academy's management processes and development plans. Having a full understanding of the relevant key performance indicators and providing support to senior leaders and local governing bodies in the interpretation of these.
5. To prepare timely and accurate financial reports and information for the Trust, academies, and relevant stakeholders. Providing financial insights and analysis to support the achieving of agreed aims and objectives including, modelling the impact of proposed initiatives and changes.

6. To work closely with Chief Financial Officer on the consolidation of budgetary and forecasting information from individual academies within the Trust.
Benchmarking information, analysing figures and trends to provide insights and prompt lines of enquiry.
7. To ensure that finance processes are well embedded in accordance with the Finance Policy. Proactively addressing issues and supporting the Finance team to always maintain an effective two-way flow of information and communication that ensures matters are resolved efficiently and do not impact on deliveries or payments to suppliers.
8. To develop a full understanding of the Trust Procurement Policy and positively promote this to ensure that procurement processes achieve best value, compliance and that ethical and sustainable considerations are considered at all stages of the procurement cycle.
9. To maximise income from external funding agencies and from use of the facilities and ensure that best value principles are applied to the provision of externally supplied services.
10. Ensure work is planned according to meet national and local requirements and deadlines.
11. To support the Trust in achieving positive and effective lines of communication with all stakeholders, supplier groups and external agencies.
12. To promote the Trust to, and raise its profile within, the local community.
13. To ensure that services are provided, and staff are managed in ways to maximise the academic, spiritual, moral & social development of the students and within the aims & ethos of the Academy and the Trust.

Summary of job tasks:

1. Manages academy budgets, preparing, monitoring, and completing returns for financial requirements and reporting to the Trust CEO and CFO, the Academy Leadership Team, and the Local Governing Body. Regularly updating and supporting budget holders to manage their allocated budgets.
2. In line with guidance from the Trust Operations Group, assists with the development of the Academy's long term business plan advising the Academy Principal, Local Governing Bodies, and staff on budgeting, funding and grant bids, operating costs and in preparing appraisals and business cases for expenditure and projects.
3. Working alongside the Chief Financial Officer to coordinate the planning and budgeting cycles and processes including the setting of realistic assumptions and sensitivity analysis.

4. To fully reconcile actual payroll against budgeted amounts on a monthly basis, identifying the root cause of discrepancies and ensuring that staff are paid accurately.
5. To work with service leads to set realistic and feasible operating budgets. To ensure that funds are allocated to meet compliance requirements and going maintenance of academy sites and equipment to maintain agreed standards, prevent breakdowns and maximise the lifespan of assets.
6. To work with service leads to ensure that assets are identified and that inventories of assets including location and condition are maintained. To plan entire lifecycle of assets including safeguarding, maintenance, upgrades, and eventual replacement.
7. Research and identify potential funding sources, grant opportunities, and partnerships to diversify revenue streams. Completing bid forms, grant applications and building strong and positive relationships with colleagues and others to positively promote the academy and Trust and ensure that the impact of projects is maximised for all stakeholders.
8. To ensure financial viability and compliance of trips and other charges and ensuring that they are in line with the Trust Finance Policy and Charging and Remissions policy.
9. To record and maintain accurate and up to date contract information using the Trust's contract management software.
10. Dealing with and negotiating on behalf of the Trust with a range of external and internal contacts, acting as its representative on working parties and at meetings, etc.
11. Responsible for daily safekeeping, and maintenance of information in line with Trust and legal requirements.
12. To undertake any other duties, commensurate with the level of the post, as may be required from time to time.

Person Specification – Finance Business Partner

Ref	Criteria	E/D	App	Ref	Int
1. Qualifications and Training					
1a	A level of numeracy and literacy sufficient to carry out the duties of the post (min Grade C/Level 5 GCSE Maths & English)	E	✓		
1b	A minimum of three years experience managing school/academy budgets.	E	✓		
1c	School Business Management qualification or equivalent Level 5 Business qualification	D	✓		
2. Professional Experience and Knowledge					
2a	Experience of building and controlling academy budgets over £2.5m	E	✓		✓
2b	Advanced proficiency in Microsoft Excel, including but not limited to LOOKUPS, SUMIFS, pivot tables and formula writing.	E	✓		✓
2c	Experience of effectively dealing with people from a variety of backgrounds on the telephone, via digital communication channels and on a face-to-face basis.	E	✓		✓
2d	A high level of financial management competencies to meet the complexity of financial management in Multi Academy Trusts.	E	✓		✓
2e	Detailed knowledge of Academy Finance regulations and procedures.	D	✓		✓
2f	Experience of interpreting new legislation; conditions of grants, guidelines, and initiatives, and proposing action to meet these requirements.	E	✓		✓
2g	Experience in highly effective resource management including the deployment of staff.	E	✓		✓
2h	High level of oral and literacy skills, able to write formal communications.	E	✓	✓	✓
2i	High level of IT competence and numeracy including Microsoft Office, Word, Excel, and databases.	E	✓		✓
2j	Experience of using a finance system.	E	✓		✓
2k	Experience of using PS Financials.	D	✓		✓
3. Equal Opportunity					
3a	Must be able to recognise discrimination in its many forms and willing to put the Trust's Equality Policies into practice.	E	✓		✓
4. Other Skills					
4a	Able to exercise sound judgment to distinguish between routine issues that can be resolved independently and other issues which may have wider consequences trust wide.	E	✓		✓
4b	Able to produce clear and concise reports and make recommendations therefrom including forecasting reports.	E	✓		✓

4c	Knowledge of extracting and analysing data from a mixture of manual and computer sources and able to work with statistics.	E	✓		✓
4d	Ability to interpret complex and detailed reports and data sets and draw meaningful conclusions.	E	✓	✓	✓
4e	Able to prioritise and meet deadlines dealing with unexpected, changing, and urgent demands.	E	✓		✓
4f	Able to proactively seek additional funding streams and write bids.	E	✓		✓
4g	Willingness to share knowledge and skills and support, manage relationships and motivate others.	E	✓		✓
4h	Able to record information accurately with high attention to detail, providing clear and concise information.	E	✓		✓
4i	Able to work collaboratively fostering positive professional relationships within the Trust.	E	✓	✓	✓
4j	Maintain positive relationships with suppliers, external agencies, and stakeholders, in line with the responsibilities of the role.	E	✓		✓
5. Personal Qualities					
5a	Strong attention to detail and high level of professional curiosity.	E	✓		✓
5b	Highly motivated with positive approach towards work.	E	✓	✓	✓
5c	A solution focussed individual.	E	✓		✓
5d	High level oral and written communication skills.	E	✓	✓	✓
5e	High standards of professionalism, confidentiality & discretion.	E	✓		✓
5f	Calm and focussed under pressure.	E	✓		✓
5g	Reliable, punctual, and flexible when required.	E	✓	✓	✓
6. Other Considerations					
6a	Willing & able to work out of normal hours, e.g. for school events, governors meetings, etc.	E	✓		✓
6b	Willing & able to travel between all academies within the Trust.	E	✓		✓
6c	Willing & able to travel locally to other schools / colleges / academies and occasionally to other local or national venues as appropriate.	E	✓		✓
6d	Willing & able to take annual leave during school holiday periods.	E	✓		✓

E – Essential, D – Desirable

App – Application Form, Ref - Reference, Int - Interview