



St Joseph

Catholic Multi Academy Trust

JOB DESCRIPTION and PERSON SPECIFICATION

Job Title:	Finance Business Partner	Grade:	7 (SCP 30-35)
Area/Section:	Central Team	Salary:	£39,513 - £44,711 per annum
Date Prepared:	February 2025	Hours:	37 hours per week
		Contract:	Permanent, all year round

Why Join Us

This is an exciting opportunity to be part of a growing, forward-thinking Multi-Academy Trust at a time of transformation and innovation. As a Finance Business Partner, you will play a key role in shaping financial strategy, driving efficiency, and modernising financial processes to support sustainable growth.

This role goes beyond traditional finance—you will have the opportunity to embrace digital transformation, automation, and data-driven decision-making while working closely with senior leaders and school business managers.

If you are a finance professional with a passion for strategic impact, technology, and innovation, we want to hear from you!

Role Summary

We are looking for a dynamic and ambitious Finance Business Partner to support the Head of Finance and CFOO in delivering high-quality financial services across the Trust.

This role offers a unique blend of financial management, strategy, and digital transformation. You will be instrumental in:

- Developing modern, automated finance processes using AI, workflow tools (Monday.com, Power BI), and automation technologies.
- Providing expert financial advice to Headteachers, School Business Managers, and key stakeholders to support strategic decision-making.
- Ensuring financial sustainability across the Trust by producing accurate budgets, forecasts, and management accounts.
- Driving efficiency and best practice by streamlining processes, implementing audit recommendations, and supporting procurement strategy.

Key Responsibilities and Accountabilities

Strategic Finance & Budgeting

- Support the Head of Finance in ensuring the efficient and prudent management of Trust funds through comprehensive financial management, analysis, and advice.
- Lead on budget preparation, forecasting, and management accounts, providing data-driven insights for strategic decision-making.
- Work closely with Headteachers and School Business Managers to ensure financial sustainability and support long-term planning.

- Ensure consistent financial standards and business processes across the Trust, aligning with best practices and compliance requirements.
- Support the preparation of all statutory financial reports (e.g. BFRO, Annual Accounts, and Monthly Management Accounts).

Process Modernisation & Digital Innovation

- Champion the modernisation of finance processes, supporting the move towards automation and AI-driven financial workflows.
- Implement and optimise financial software and digital tools (e.g. Monday.com, Power BI, and accounting systems) to improve efficiency.
- Ensure financial data integrity and consistency across all Trust schools, driving improvements in reporting, analysis, and compliance.
- Support the Head of Finance in business continuity planning, ensuring financial processes remain robust and risk-mitigated.

Financial Compliance & Governance

- Ensure full compliance with the ESFA's Financial Handbook and the Trust's Financial Policies and Procedures.
- Assist with internal and external audits, ensuring all financial processes meet governance and regulatory requirements.
- Ensure year-end audit files are prepared to a high standard, allowing for a smooth, issue-free external audit process.
- Maintain VAT records and prepare Trust VAT returns, ensuring accurate accounting and timely submissions.
- Support the procurement strategy, conducting Best Value Reviews to ensure efficient use of Trust resources.

Trust Growth & New School Onboarding

- Assist with financial due diligence for new schools joining the Trust, ensuring robust financial assessment before integration.
- Support the onboarding process for new academies, ensuring a smooth financial transition into the Trust's systems and processes.
- Collaborate with senior leaders and external advisors to review financial risks and opportunities associated with Trust expansion.
- Work with newly joining schools to ensure their finance teams are trained on Trust-wide financial policies, systems, and reporting standards.
- Provide ongoing financial guidance and operational support to help new schools integrate efficiently and align with Trust financial procedures.

Collaboration & Leadership

- Act as the Trust's expert on the corporate ledger, ensuring data input processes are applied consistently across all schools.
- Provide practical cover for temporary periods of absence or limited staff capacity, ensuring financial operations continue smoothly.
- Meet regularly with Headteachers and School Business Managers to review month-end reporting, management accounts, and audit preparations.
- Deputise for the Head of Finance when required, offering leadership and strategic financial oversight.
- Train and support new staff and academy conversions, ensuring a smooth transition and consistent application of Trust finance procedures.

Operational Finance & Transactional Support

- Authorise purchase invoices, sales invoices, income receipting, and BACS payments across all academies within the Trust.

- Conduct regular bank reconciliations, internal recharges, and month-end closedown procedures.
- Monitor and maintain supplier and customer records, ensuring accurate financial data across the Trust.
- Assist with maintaining governance records for the Trust.
- Undertake other relevant administrative and financial tasks as required to support the Head of Finance and CFOO.

General Responsibilities

- Follow all Trust policies and procedures relating to legislative and statutory requirements, including on Health and Safety and Safeguarding, including those required by Company, Education and Charity law, Data Protection, and funding agreements.
- Participate in the performance and development review process, taking personal responsibility for identifying learning, development, and training opportunities in discussion with the line manager.
- Be open to innovation and contribute ideas for improvement within the finance function and wider Trust.
- Ensure equal opportunities for all by supporting inclusivity and diversity within the workplace.
- Attend meetings within the Trust and external events as required.
- Engage with other professionals, leveraging cross-functional collaboration to optimise financial processes.
- Maintain confidentiality in respect of Trust-related matters and prevent the disclosure of sensitive information.
- Promote a safe and healthy environment for students, staff, and visitors.
- Undertake other duties commensurate with the grade of the post as directed by the Head of Finance.

The above principal accountabilities are not exhaustive and may vary without changing the character of the job or level of responsibility. The postholder must be flexible to ensure the operational needs of the Trust and Academies are met. This includes the undertaking of duties of a similar nature and responsibility as and when required, throughout the various workplaces in the Trust.

What we offer

- A Competitive Salary Package: £39,513 - £44,711 per annum.
- Career Development & Progression: A clear pathway to senior leadership, including deputising for the Head of Finance.
- Flexible, Forward-Thinking Work Environment: Supportive leadership that encourages innovation and process improvement.
- Impact & Purpose: Your work will directly contribute to the financial sustainability of schools, ensuring better outcomes for students.
- Ongoing Professional Development: Access to training, digital finance tools, and leadership opportunities.
- Employee Wellbeing & Benefits: Access to a comprehensive Employee Assistance Program (EAP), including 24/7 mental health support, face-to-face counselling, and financial wellbeing tools. Plus, enjoy exclusive discounts through the Trust's benefits program, offering savings on shopping, lifestyle, and travel.



PERSON SPECIFICATION

The information listed as essential (the column that is shaded) is used as part of the job evaluation process. The requirements identified as desirable are used for recruitment purposes only.		
	Essential	Desirable
1. Qualifications and Training		
ACA/ACCA/CCAB Qualified Accountant or AAT Level 4, if can evidence strong management accounts preparation skills.	✓	
A passion for finance, digital transformation and process improvement.	✓	
Understanding of financial principles and practices	✓	
Proficiency in Microsoft Office, particularly Excel, as well as familiarity with automation and workflow management tools such as Monday.com or Power BI.	✓	
Full clean driving licence and car available for business use.	✓	
Familiarity with automation and workflow management tools such as Monday.com or Power BI.		✓
2. Experience, Knowledge and Skills		
Strong numerical and analytical skills.	✓	
Attention to detail and accuracy.	✓	
Flexibility to adapt to changing workload and demands.	✓	
Excellent interpersonal skills.	✓	
Able to work both independently and as part of a team.	✓	
Substantial experience of producing management accounts and variance analysis	✓	
Experience of working with budget holders to report against budgets and forecasts and interpret results.	✓	
Experience of developing internal processes and implementing recommendations from audits or other evaluation.	✓	
Experience of achieving internal compliance and improving efficiency.	✓	
Experience of developing and working within systems and processes to monitor financial performance against budgets and forecasts.	✓	
Experience of planning, developing, implementing, delivering, monitoring, evaluating and reviewing operational activities.	✓	
Experience of managing and delivering objectives including dealing with competing priorities and other challenges.	✓	
Experience of working collaboratively and in partnership with individuals, groups, organisations and stakeholders internally and externally.	✓	
Experience of working in an office environment and completing administration tasks.	✓	
Experience of formulating budgets and their rigorous monitoring.	✓	
Experience of performing bank reconciliations.	✓	
Experience of financial accounting systems.	✓	
Experience of using Budget modelling tools.		✓
Previous relevant experience at a senior level.		✓
3. Professional and Personal Qualities		
Belief that every student should have access to an excellent education regardless of background.	✓	

The information listed as essential (the column that is shaded) is used as part of the job evaluation process. The requirements identified as desirable are used for recruitment purposes only.

	Essential	Desirable
A commitment to the Trust's core purpose around giving children a world-class Catholic education.	✓	
A commitment to supporting the Catholic ethos of the Trust.	✓	
Willingness and commitment to Professional Development.	✓	
To have excellent attendance and punctuality.	✓	
Ability to persuade, motivate, negotiate, and influence.	✓	
Customer-focused and committed to the delivery of excellent customer service.	✓	

The requirements listed below are not considered during the job evaluation process, but are essential requirements for the role that will be assessed during the recruitment process.

Disclosure of Criminal Record:

The successful candidate's appointment will be subject to the Trust obtaining a satisfactory Enhanced and Barring List Disclosure from the Disclosure and Barring Service (if ticked as an essential requirement).	✓	
If the post-holder requires a DBS disclosure the candidate is required to declare full details of everything on their criminal record.	✓	
If the post-holder does not require a DBS disclosure the candidate is required to declare unspent convictions only.		N/A

The employment checks are required:

Evidence of entitlement to work in the U.K.	✓	
Two satisfactory references	✓	
Confirmation of medical fitness for employment	✓	
Registration with appropriate bodies (where applicable)	✓	