

# Job Description

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<b>Job title:</b>	Finance Business Partner	<b>Contract Type:</b>	Permanent
<b>Responsible To:</b>	Head of Finance Business Partner	<b>Grade &amp; Spine Point:</b>	PO6
<b>Location:</b>	All UST Schools		

## INTRODUCTION

The University Schools Trust (UST) is a unique partnership of six world-leading universities and four sector-leading bodies who are working together to deliver a shared vision of inclusive, high quality and transformational education delivered by schools which are deeply rooted in the communities they serve.

We take a rigorous approach – educating from nursery to university and beyond – to all aspects of our work. Our teaching practice is effective, our students are challenged to achieve their best and we use our resources efficiently. Our values of communication, investigation, participation, networking, scholarship and vision are core to all our work.

As a small, growing and dynamic trust. We are small enough to know and care about the professional development of every single employee, and through our influential trust partners we have increased the scope of our work and the opportunities available to students and our staff

### OUR VISION

To provide transformational educational opportunities for children across London, setting the agenda for social mobility and sector-wide change.

### MISSION STATEMENT

Our mission at UST is to improve the outcomes of all our pupils by ensuring we train, recruit and retain the highest calibre of staff across our workforce. Our teaching practice will be research led in partnership with our academic Trust sponsors and the evidence collated will influence local, national and international policy. We will share our best practice with others, extending our success and influence. A critical mass of schools will enable a flexible, school-to-school support structure which will ensure a platform to develop school leaders. Leaders at all levels will provide a systematic succession plan for our schools.

### JOB PURPOSE

Working as part of the Central Finance Team, the role will report to the Head of Finance Business Partner at our head office in Tower Hamlets, but will require significant time to be spent on-site at the schools across the trust.

As a Finance Business Partner, you will play a crucial role in supporting budget holders in their financial and strategic decision making. Working within the central finance team you will be responsible for the month end reporting cycle, periodic forecasting and yearly budget setting. You will help translate financial information into insightful commentaries, and provide input into benchmarking, dashboarding and financial modelling.

## RESPONSIBILITIES

1. Lead the Academy monthly financial reporting
2. Financial guidance and support to senior management and budget holders. Challenging and supporting senior management in managing spend on a portfolio basis. Recognising potential risk and opportunities and identifying solutions to manage them.
3. Leading the monthly management accounts to identify and address any areas of over / underspend, in partnership with Headteachers and Executive Headteachers
4. Presenting financial information to Senior Management Teams on a regular basis. Communicating complex financial issues to internal and external stakeholders, enabling individuals with little financial knowledge to understand key messages.
5. Providing sound financial advice and management to ensure that the financial implications have been properly considered, are affordable and recommendations reflect good Value for Money
6. Leading on financial planning and forecasting exercises, supporting and providing constructive challenge to business areas when identifying their funding requirements in-year and going forward. This will include working on significant fiscal events such as Spending Reviews.
7. Reviewing the monthly management accounts to identify and address any areas of over / underspend, in partnership with Headteachers and Executive Headteachers
8. Managing the annual budget setting and forecasting process for the designated schools, ensuring assumptions are sound, prudent and in line with Trust guidelines
9. Support with balance sheet, control accounts and cash flow management
10. Review and authorisation of Academy BACS runs along with the Head Teacher
11. Review of monthly credit card and petty cash reconciliations
12. Review and manage of aged debtors and creditor reports and support finance officers in clearing balances
13. Review and manage of payroll reports and highlight significant variations to budget to the Head Teacher
14. Updated monthly the budgeting software IMP with staff changes/forecast
15. Assisting with the Teachers' Pension reconciliations, annual reporting and audit
16. Assisting with the financial risk to be captured in the Academy's risk register if needed
17. Managing all internal and external financial audit processes
18. Ensuring all ESFA/ LA financial claims are made on behalf of the Academy
19. Working with Academy SENCO to ensure all the required funding is duly claimed, including LAC funding
20. Working with Academy budget holders to ensure reporting forecasts are accurate
21. Assisting with Finance Officer recruitment, support and training
22. Help with Academy contracts register review
23. Termly fixed asset verifications
24. FSM assessments
25. Support with costing analysis and budgetary sign-off needed for new contract negotiation
26. Ensuring that Head Teacher/ Senior Leaders have a detailed and effective continuous training programme.
27. Attend and present management accounts at governors meetings on a termly basis

### People management

1. The post does not have line management responsibilities, but the FBP will have oversight of school based staff carrying out finance duties and will be responsible for ensuring these activities are carried out in line with the Trust's Scheme of Financial Delegation.

### General

1. Providing proactive and sound financial advice to school leaders and governors, and ensuring financial training and development needs are identified and appropriate training delivered
2. Working closely with the central transactional team to ensure all financial activity for the designated schools is processed on a timely and accurate basis
3. Ensuring all activities are carried out in line with the Trust's Scheme of Financial Delegation and ESFA's Academies Financial Handbook
4. Keeping abreast of funding, legislative and other changes in the Educational environment and ensuring the Headteachers and Local Governing Board remain fully informed
5. Providing support to the Chief Finance Officer and Financial Controller.

**BEHAVIOUR, ATTITUDE AND TEAM WORK**

1. Be flexible in working hours and available for operational support as required.
2. Demonstrate a proactive "can do" attitude.
3. Partake in the Trust's annual appraisal process.
4. On an ongoing basis, review how the role fits into the site operations, in line with the changing demands of the UST.
5. Maintain good working relationships with the Headteachers and key staff at each school.
6. Be part of a cohesive working team to provide a high level of service to all schools.
7. Liaise, assist and work with all UST departments

**TRAINING**

1. Undertake training as required to be effective in carrying out all duties and attend staff meetings as necessary.

**JOB DESCRIPTION AGREEMENT**

The post holder will be line managed and appraisal managed by: Head of Finance Business Partner

The above job description was agreed on ..... (date). It may be reviewed and/or amended at any time but before this happens you will be given appropriate opportunities to discuss the proposed amendments. It will be reviewed as part of the annual appraisal process.

\_\_\_\_\_ Signed by (Post holder)

\_\_\_\_\_ Signed by (Trust Leader)

# Person Specification

## Finance Business Partner

Education and Qualifications	Essential	Desirable
<ul style="list-style-type: none"><li>CIMA/ACCA/CIPFA qualification</li></ul>	✓	
<ul style="list-style-type: none"><li>GCSE passes in Maths and English or recognised equivalent.</li></ul>	✓	

Knowledge and Experience	Essential	Desirable
<ul style="list-style-type: none"><li>Excellent working knowledge of core accounting concepts with the ability to explain to colleagues</li></ul>	✓	
<ul style="list-style-type: none"><li>Extensive experience working in financial management</li></ul>	✓	
<ul style="list-style-type: none"><li>Demonstrable expertise in the completion of financial reports</li></ul>	✓	
<ul style="list-style-type: none"><li>Experience of budget management and monitoring</li></ul>	✓	
<ul style="list-style-type: none"><li>Experience in managing financial risks</li></ul>	✓	
<ul style="list-style-type: none"><li>Ability to complete core transactional work alongside strategic level responsibilities</li></ul>	✓	

Key Skills and Abilities	Essential	Desirable
<ul style="list-style-type: none"><li>Excellent communication skills both spoken and written</li></ul>	✓	
<ul style="list-style-type: none"><li>Excellent interpersonal skills and gravitas to liaise with senior staff</li></ul>	✓	
<ul style="list-style-type: none"><li>Good team working and relationship building skills</li></ul>	✓	
<ul style="list-style-type: none"><li>Experience of and ability to work to tight reporting deadlines</li></ul>	✓	
<ul style="list-style-type: none"><li>A "can do" attitude</li></ul>	✓	
<ul style="list-style-type: none"><li>Excellent time management skills</li></ul>	✓	
<ul style="list-style-type: none"><li>Good analytical skills and a positive approach to problem solving</li></ul>	✓	
<ul style="list-style-type: none"><li>High level of Excel skills and good exposure to different Accounting Systems</li></ul>	✓	
<ul style="list-style-type: none"><li>The ability to work flexibly in a rapidly changing business</li></ul>	✓	

Personal Attributes	Essential	Desirable
<ul style="list-style-type: none"><li>Commitment to the aims of the schools working together as a Trust</li></ul>	✓	

• Self-motivated with drive, initiative and high degree of pro-activity	✓	
• Sense of humour and equable temperament	✓	
• Commitment to working as a positive and constructive team member	✓	
• Commitment to Equal Opportunities	✓	
• Confidentiality and diplomacy	✓	
• Strategic and analytical thinking	✓	
• Organisation wide holistic approach	✓	

