



<b>POST TITLE:</b>	Finance Business Partner	<b>GRADE</b>	WMAT 7/8
<b>RESPONSIBLE TO:</b>	Finance Manager	<b>DATE:</b>	February 2021

### Key Relationships

Multi Academy Trust School staff and leadership teams  
Headteachers and Principals  
Internal and External Auditors  
Trust IT, Premises and HR Teams  
External suppliers and contractors

### Hours of Work

This job description relates to the tasks that a full time employee could reasonably be expected to undertake. Part time staff will have tasks allocated on the basis of their contracted hours.

### Location

The role is currently based at Wellsway School however in future could be based at a different school within the Trust or a separate location in close proximity to the Trust's schools. Some travel between the Trust's sites will be required.

### Purpose of role

Contributing to the long term financial viability of the Trust, through a strong and effective finance business partnering service to the Trust's primary and special schools and central service functions; supporting budget holders to manage their budgets and understand underlying cost drivers and initiatives to improve financial performance in the delivery of pupil led outcomes.

Maintaining robust financial management through budget setting and monitoring, delivering high quality internal reporting and analysis which leads and supports executive decision making.

Working as part of a team to deliver an excellent standard of customer service to the academies within the Trust.

Contributing to the Trust's delivery of 'value for money' through efficient working practices, alongside identification and analysis of income and savings opportunities.

Supporting the delivery of external statutory and regulatory reporting, whilst maintaining the principles of value for money, regularity and propriety through effective compliance and governance.

### Duties

1. Compilation of annual 3-year budget forecast for primary, special and central support functions. To be produced in line with agreed processes and assumptions; generating reliable budgeting information for submission to the ESFA and future budget monitoring.
2. Providing robust financial management through the delivery of monthly management accounts; gaining an understanding of key variances, issues and risks within the schools and central functions that you are supporting. Building strong relationships with senior leadership; and where appropriate providing challenge to the school's key stakeholders regarding their financial management.

3. Gain a strong understanding of curriculum led cost drivers that influence a primary or special school's financial performance, supporting the provision of accurate financial information to update ICFP (integrated Curriculum-led financial planning) reporting and analysis.
4. Review financial performance against benchmark data, to ensure that resources are targeted to maximise value for money; identifying areas where additional analysis may help deliver savings.
5. Provide financial assurance to the Finance Manager regarding individual school performance along with reporting and monitoring against remedial actions.
6. Gaining a good understanding of the schools various income streams and associated resources and expenditure, delivering timely and accurate reporting to enable transparent monitoring to demonstrate use of resource and compliance to funding conditions.
7. Support the accuracy and production of the Trust's annual statutory accounts through the monthly review, reconciliation and resolution of outstanding issues on the schools balance sheet accounts.
8. Responsible for year-end accounting adjustments for your allocated schools, in relation to accruals, prepayments, debtors and creditors; ensuring that the schools income and expenditure is correctly stated for statutory accounts purposes.
9. Responsible for performing monthly payroll reconciliations for your allocated schools to validate current payroll each month, identifying exceptions and resolving issues. Ensuring that the budget planning software reflects the current payroll each month for future forecasting and reconciliation.
10. Supporting the Finance Manager with budget compilation and monitoring of the central support functions and the trading subsidiary which includes the Trust's catering provision.
11. Provision of adhoc financial analysis to support business initiatives such as procurement and business modelling.
12. In all aspects of your role assist in the review of finance procedures and ensure that compliance is being properly implemented across the Trust in accordance with the Trust's Finance Policy, ensuring consistent approaches and best practices are applied
13. Recommend improvements, identify opportunities and engage with continuous improvement to support a high performing finance function within the Trust.
14. Support and provide cover for other Finance colleagues when required

### **Data Protection and Safeguarding**

- Work within the requirements of Data Protection at all times
- Understand your responsibilities in relation to Safeguarding and child protection and how to highlight an issue / concerns
- Remain vigilant to ensure all students are protected from potential harm

### **General**

- The post-holder will be expected to undertake any appropriate training provided by the Trust to assist them in carrying out any of the above duties
- The post-holder will be expected to contribute to the protection of children and young people, as appropriate, in accordance with any agreed policies and/or guidelines, reporting any issues or concerns to their immediate line manager
- The post-holder will be required to promote, monitor and maintain health, safety and security in

the work place. To include ensuring that the requirements of the Health & Safety at Work Act, COSHH, and all other mandatory regulations are adhered to

- An Enhanced Disclosure with the Disclosure and Barring Service (DBS) will be undertaken before an appointment can be confirmed. The successful candidate will be required to disclose all convictions and cautions, including those that are spent; the exception being certain, minor cautions and convictions which are 'protected' for the purposes of the 'Exceptions' order.  
<https://www.gov.uk/government/collections/dbs-filtering-guidance>
- Wellsway Multi Academy Trust is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment. For this post prior to appointment, Wellsway Multi Academy Trust will apply for an enhanced disclosure certificate from the Disclosure and Barring Service.
- This job description only contains the main accountabilities relating to the posts and does not describe in detail all of the duties required to carry them out. The post holder may be required to undertake other duties and responsibilities that are commensurate with the nature and level of the post.

<b>Person Specification - Finance Business Partner</b>	<b>Essential (E) or Desirable (D)</b>
<b>Qualifications</b>	
Qualified Accountant or demonstrable equivalent experience	<b>E</b>
Relevant post-qualification experience at suitable level	<b>D</b>
<b>Experience</b>	
Experience of finance in a School, Academy or Education setting	<b>D</b>
Underpinning knowledge of effective financial procedures and controls	<b>E</b>
Achieved VFM and improvement within the organisation	<b>E</b>
Experience in working with external professional organisations. (Lawyers, accountants, insurers, funding agencies, local authority etc)	<b>D</b>
Experience of supporting senior management by developing effective management information and departmental budgeting and control	<b>D</b>
Team player, guiding and working towards the aims of the department	<b>E</b>
Effective working knowledge of up to date financial legislation and standards	<b>D</b>
<b>Behaviours</b>	
A pro-active, self-starter with professional integrity	<b>E</b>
Able to support, guide, challenge and influence ensuring that financial controls are followed	<b>E</b>
High performer who is adaptable, flexible and dynamic	<b>E</b>
<b>Skills</b>	
Strong organisation, prioritisation and time management skills	<b>E</b>
Able to work under own initiative with minimal supervision	<b>E</b>
Excellent numerical, analytical, written and verbal communication skills	<b>E</b>
Provided effective financial control balanced by flexibility yet with a clear customer centred service ethos	<b>E</b>
Critical attention to detail together with the ability to understand the Trust's strategic objectives	<b>E</b>
Proven ability to work in a fast paced environment	<b>E</b>
Ability to work collaboratively, supporting other colleagues in order to achieve departmental objectives	<b>E</b>
Effective interpersonal skills in order to consult with peers and senior managers	<b>D</b>
Self-motivated and pro-active in managing own workload, functioning effectively under pressure to deliver work to deadlines and to a high quality standard	<b>E</b>
An understanding of the importance of confidentiality and the requirements of the Data Protection Act	<b>E</b>
Proficient in the use of Excel, financial accounting systems e.g. PSF and education cashless payment systems e.g. Tucasi	<b>D</b>
<b>Attributes</b>	
Committed to the Wellsway Multi Academy Trust aims	<b>E</b>
Committed to Equality and Diversity	<b>E</b>
Committed to own continuing professional development	<b>E</b>
<b>Other</b>	
Occasional work outside normal working hours including school holidays - prior notice given	<b>E</b>
Use of own vehicle to travel	<b>E</b>