



Job Description

Job Title	Finance Partner
Grade	Scale 9
Reports to	Head of Finance (HOF)
Liaison with	Headteachers, Local School Boards, Vine Central Team, Vine Processing Team, External Agencies, Auditors
Job Purpose	<ul style="list-style-type: none"> • To have responsibility over multiple schools • To give strategic vision and leadership to all aspects of budget and finance • To operate, maintain and develop the financial procedures and systems of the schools, in co-operation with the Head of Finance and Headteacher • Play a central and creative role in the Central Financial Group • Ensure that the school is fully prepared to meet DfE financial criteria • To liaise with the relevant members of the Vine Central Team and funding bodies
Duties	<p>General</p> <ul style="list-style-type: none"> • To lead and advise the School Leadership Group on matters relating to finances • To have regular meetings with the School Leadership Groups • To attend finance Local Governing Body/Local Board meetings as agreed • To take delegated responsibility for financial decisions following appropriate discussions with the Headteacher and Head of Finance • Support internal/external audit <p>Human Resources</p> <ul style="list-style-type: none"> • To provide leadership and guidance for Central Trust Coordinator (school-based) including direct line management responsibility • To be responsible for professional development, appraisal and training of relevant Central Trust Coordinator including satisfactory monitoring and reporting of probationary periods <p>Financial</p> <p>Working with the Headteachers and the Head of Finance will prepare an annual budget for the school to be recommended by the Vine Trust Board and will provide specific expertise on long-term financial management. The Finance Partner will be responsible specifically for:</p>

	<ul style="list-style-type: none"> • Comply with the Trust financial regulations and the academies trust handbook • Ensuring the schools have appropriate financial systems and managing all aspects of the school's financial systems in accordance with these agreed policies and timetable; ensuring accurate financial records are maintained and reported on a regular basis to the Head of Finance and Headteacher • To ensure that the financial transactions in the schools are carried out in an appropriate manner and that the financial regulations of both the Vine and the schools are observed • Preparation for approval by local governors of monthly estimates of annual income and expenditure. The provision of detailed management accounts for the Headteacher and Head of Finance according to an agreed schedule, reporting immediately any exceptional problems to be reviewed by the Head of Finance • Manage the school's financial package giving guidance to other users • To prepare appraisals for particular projects and the development of long-term initiatives for the school • To co-operate, initiate and manage audit procedures as necessary • To prepare all financial returns within statutory deadlines • To lead on writing the financial sections of bids for funding as required by the Vine Trust • Submit capital bids to the Vine, monitor and control of capital expenditure on buildings and grounds, placing of contracts, appointment and monitoring of contractors • Support staff responsible for delegated budgets with procedures which enable them to monitor these budgets • Monitor the standard and cost effectiveness of the school's trading arrangements in conjunction with the Head of Finance within agreed performance indicators
<p>General</p>	<ul style="list-style-type: none"> • To participate in the performance and development of review processes, taking personal responsibility for the identification of learning, development and training opportunities in discussion with the Chief Financial Operating Officer (CFOO) and Head of Finance • To comply with individual responsibilities, in accordance with the role, for health & safety in the workplace • Ensure that all duties and services provided are in accordance with the School's Equal Opportunities Policy • The Vine Trust Board is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share in this commitment • The duties above are neither exclusive nor exhaustive and the post

	holder may be required by the CFOO or Head of Finance to carry out appropriate duties within the context of the job, skills and grade
--	---

PERSON SPECIFICATION – FINANCE PARTNER

General Heading	Detail	Examples
Qualifications & Experience	Specific qualifications & experience	An appropriate financial professional qualification preferred (AAT/ACCA/CIMA/SBM/SBL) part qualified or fully Successful accounting experience working in a financial environment An understanding of primary school ethos
	Knowledge of relevant policies and procedures	Understands Vine Trust financial systems and procedures (training will be provided)
	Numeracy	The ability to prepare, monitor, evaluate and review the budget Preparation, understanding and interpretation of all financial data
	Technology	Thorough working knowledge of ICT and the software relating to finance.
	Written	Ability to complete complex returns, write complex letters and reports.
Communication	Verbal	Ability to exchange complex information clearly and sensitively. Ability to address CFOO, HOF, SLT and Local Board
	Languages	Ability to exchange complex information clearly and sensitively. Ability to address CFOO, HOF, SLT Local Board
	Behaviour Management	Understand and implement the Behaviour Management Policy, as required.
Working with children	Health & Well being	Understand the importance of physical and emotional wellbeing
	Working with partners	Understand the importance of physical and emotional wellbeing
Working with others	Relationships	The ability and personal qualities to motivate staff The ability to receive as well as give constructive advice
	Team work	Ability to work well in a team, both as a member and leader
	Information	Develop and implement effective systems to

		share and safeguard information.
	Organisational skills	Experience of strategic planning activities and the development of business plans Experience of financial planning, financial management and budgetary control within an organisation Have the ability to plan at both the tactical and strategic level
Responsibilities	Time Management	Be well organised, have a high level of initiative and be able to delegate effectively and appropriately Able to ensure that tight, strict deadlines are met.
	Creativity	Demonstrate a highly creative approach to work Able to resolve complex problems independently.
	Equalities	Demonstrate commitment to treating all people fairly
	Health & Safety	Excellent understanding of Health and Safety.
General	Child Protection	Understand and comply with Child Protection procedures.
	Confidentiality/Data Protection	Understand and comply with procedures and legislation relating to confidentiality
	CPD	Demonstrate a clear commitment to develop and learn in the role. Able to effectively evaluate own performance Ability to transfer new knowledge to the workplace