

## Job Description

<b>Post Title:</b>	<b>Trust Finance Partner</b>
<b>Location:</b>	<b>Spencer Academies Trust</b>
<b>Salary/Pay Range:</b>	<b>NJC24 – NJC28 (5-point range) <i>depending on experience and/or qualifications</i></b>
<b>Hours of work:</b>	<b>Full or Part Time, Flexible Working, Fixed Term Maternity Cover initially</b>
<b>Reporting to:</b>	<b>Senior Finance Partner</b>

### **Purpose of Role**

The post holder will advise and assist the Senior Leadership of Academies and the Central Trust Functions to develop financial plans, budgets and forecasts; to prepare monthly accounts and respond to requests for financial information. In addition, the post holder will provide oversight of the delegated financial management and governance of those academies to ensure sound and appropriate financial governance and risk management arrangements are in place.

The Post Holder will support colleagues within academies with advice on the Trust's financial policies and procedures; providing appropriate guidance, training and support as needed.

The post holder will provide analysis of financial transactions through the financial and accountancy systems to ensure the provision of accurate and timely financial information to each academy's management, The Spencer Academies Trust and external bodies as required.

### **Main Duties and Responsibilities**

#### ***Finance and Business Planning***

The postholder will be expected to use all Trust standard computer hardware and software packages where appropriate. Specific responsibilities include:

- Plan, prepare, monitor and evaluate the annual school budget in consultation with the Academy's Senior Leadership Team.
- Working in liaison with the Academy's Senior Leadership Team in the setting and apportionment of the Annual Budget for the coming year.
- Providing the school management team with a range of financial and budgetary information as required.
- Responsibility for ensuring accurate reporting of budgetary expenditure throughout the year.
- Operating the school's financial procedures in accordance with Trust guidelines, Financial Regulations, Academy and Trust Policy and Practice.
- Responsibility for the implementation and development of new and revised financial accounting systems in line with Trust policies.
- Overall responsibility for maintaining the computerised Financial System in line with Trust policies.
- ensuring that financial deadlines are met.
- Production of reports in line with Trust policies.
- Analysis of income/expenditure posted into the academy accounts.
- Liaise with the finance colleagues across the Trust regarding transactional activity.
- Preparation of year end journals for processing.

**General**

- Understand the implications of the Data Protection legislation, Freedom of Information and Equality Duties and ensure that there is provision to maintain confidentiality of records and information.
- Contribute to the overall aims and ethos of the Spencer Academies Trust and establish constructive relationships with nominated Academies and other agencies as appropriate to the role.
- Undertaking any other duties which may reasonably be regarded as within the nature of the duties and responsibilities/grade of the post as defined, subject to the proviso that normally any changes of a permanent nature shall be incorporated into the job description in specific terms.

These above-mentioned duties are neither exclusive nor exhaustive, the post- holder maybe required to carry out other duties as required by the Trust.

**Additional Information**

**The Spencer Academies Trust is committed to safeguarding and promoting the welfare of all our students and expects all employees and volunteers to share this commitment. All posts are subject to enhanced DBS checks and completion of Level 2 safeguarding training.**

## Person Specification

	Essential	Desirable
<b>Qualifications and experience</b>		
Evidence of financial experience to support the day to day operation of an establishment with financial constraints		✓
Accounting/book keeping qualification (AAT qualification or part qualification)	✓	
Willingness and motivation to participate in any training or development required to improve skills/performance	✓	
Experience of Financial Management Systems and accounting packages	✓	
Experience of working in an education finance environment		✓
Experience of setting multiple year budgets		✓
GCSE at A* - C in English and Mathematics or equivalent	✓	
<b>Knowledge and skills</b>		
Ability to work accurately, with meticulous attention to detail	✓	
Ability to build and form good relationships with colleagues, and other professionals	✓	
Ability to prioritise workload speedily and efficiently	✓	
Knowledge and experience of various software packages i.e. Microsoft word and Excel	✓	
Ability to use budgeting software and interpret the numbers to non-finance personnel	✓	
Excellent verbal and written communication skills	✓	
Understand and interpret requirements accurately, by effective questioning, listening, clarification and recording of information	✓	
<b>Personal qualities</b>		
Excellent interpersonal skills with ability to maintain strict confidentiality	✓	
A diplomatic and patient approach	✓	
An ability to cope with interruptions and remain calm under pressure	✓	
Ability to follow direction and work in collaboration with the finance leaders	✓	
Initiative and ability to prioritise one's own workload to meet deadlines	✓	
A willingness to seek support and advice and an awareness of where to seek it	✓	
Commitment to the Trust's ethos, aims and its whole community	✓	