

Job Title:	Finance Partner
Job Grade:	Band 9
Reports To:	Management Accountant
Direct Reports:	N/A
Clearance Required:	Enhanced DBS
Key Stakeholders:	All levels of management, finance team, employees, external agencies, and partners

Job Purpose

The Finance Partner is a key member of the Trust's central finance team, responsible for delivering high-quality financial leadership and strategic support to an allocated portfolio of schools. The postholder acts as the primary finance contact for school leaders, providing expert advice, robust financial planning and strong business partnering to enable effective decision-making and long-term sustainability.

The role also carries responsibility for leading Trust-wide financial workstreams, supporting consistent financial practice and contributing to the strategic development of the Trust as it grows.

Key Accountabilities

You will be required to work collaboratively to meet the expected outcomes of this role:

Business Partnering and School Portfolio Management – The Finance Partner will provide end-to-end financial support to an allocated group of schools, ensuring a consistent, high-quality service. Duties include:	
1.	Acting as the single point of contact for all financial matters for allocated schools
2.	Leading the annual budget-setting process for allocated schools, working closely with school leaders to develop sustainable, compliant budgets aligned to Trust priorities.
3.	Preparing accurate in-year forecasts, analysing trends, risks, and opportunities
4.	Producing monthly management accounts for each school, providing clear commentary and actionable financial insight
5.	Supporting School Leaders with resource planning, improvement planning and scenario modelling.
6.	Providing financial expertise for staffing restructures, business cases, procurement decisions and grant funding applications
7.	Ensuring compliance with Trust financial policies, DfE requirements and audit recommendations.

8.	Monitoring key performance indicators (KPIs), benchmarking and value for money outcomes.
Trust-Wide Strategic Workstreams – each Finance Partner will lead or contribute to cross-Trust financial priorities. Workstreams may include, but are not limited to:	
9.	Funding and income: <ul style="list-style-type: none"> • GAG modelling, SEN funding analysis, and pupil number projections. • Oversight of grant allocation methodologies and income reporting.
10.	Procurement and value for money: <ul style="list-style-type: none"> • Lead or support tender reviews, contract evaluations and benchmarking. • Identify opportunities to improve purchasing efficiency and cost-effectiveness.
11.	Insurance: <ul style="list-style-type: none"> • Act as finance lead for Trust-wide insurance arrangements. • Support annual insurance renewals, ensuring accurate data returns and effective coverage. • Maintain schedules of assets, vehicles, equipment, and liabilities for insurance purposes. • Co-ordinate claims handling, liaising with insurer and schools to ensure timely resolution. • Work with the CFO to review insurance needs as the Trust grows.
12.	BACS runs: <ul style="list-style-type: none"> • Provide oversight and financial control of Trust BACS payment processes. • Support the Management Accountant to ensure BACS payment files align with approved purchase orders, payroll costs and financial authorisations. • Conduct checks to ensure accuracy, compliance, and segregation of duties. • Support periodic review and improvement of BACS processes and controls
13.	Bank Reconciliation <ul style="list-style-type: none"> • Lead the Trust-wide process for bank reconciliation, ensuring that the Trust bank account is reconciled accurately and in a timely manner each month. • Review reconciliation outputs, investigating variances, unusual transactions, or timing differences, and ensuring issues are resolved promptly with the Management Accountant and school staff. • Develop and maintain robust reconciliation procedures, templates, and control frameworks to ensure consistency of approach across all settings. • Work with other Finance Partners and school-based staff to strengthen compliance with financial policies and DfE requirements relating to banking, segregation of duties and cash controls. • Provide regular reconciliation assurance reports to the CFO, highlighting risks, recurring issues, trends, or control weaknesses. • Support continuous improvement of bank reconciliation processes, including automation opportunities, system enhancements and improved audit trails.
14.	Credit Card Reconciliations:

	<ul style="list-style-type: none"> • Lead oversight of the Trust's credit card process, ensuring compliance with financial regulations and policy. • Monitor monthly credit card statements and supporting documentation from schools and central staff. • Ensure that transactions are coded correctly, supported by appropriate evidence, and reconciled in a timely manner. • Work with cardholders to resolve discrepancies and improve controls. • Support the CFO with periodic review of credit card limits, usage, and risk management
15.	<p>Trust-wide reporting:</p> <ul style="list-style-type: none"> • Support preparation of Board and Executive reports. • Lead development of financial templates, dashboards and reporting tools
16.	<p>Workstream leads will:</p> <ul style="list-style-type: none"> • Develop and maintain supporting documentation and processes. • Provide training and guidance to school and Trust colleagues. • Ensure compliance with Trust policies and audit requirements. • Deliver continuous improvements in financial control and efficiency.
Collaboration	
17.	Work closely with the Management Accountant to ensure accurate month-end processing, reconciliations, and consolidated reporting.
18.	Liaise with the Payroll & Finance Officer to maintain accurate staffing establishments, understand payroll variances and ensure timely resolution
19.	Support the Chief Finance Officer with medium- and long-term financial planning, funding reviews and Trust development proposals.
Systems, Processes and Continuous Improvement	
20.	Contribute to the design, development, and implementation of finance systems, reporting tools and standardised processes.
21.	Identify opportunities to increase efficiency, accuracy and financial control across schools and the central team
22.	Support internal and external audit processes and ensure timely completion of recommendations
General Responsibilities	
23.	Promote and uphold the Trust's values, vision and strategic goals.
24.	Ensure confidentiality and compliance with GDPR at all times.
25.	Undertake relevant training and CPD to maintain professional knowledge
26.	Provide support and cover to colleagues where appropriate to ensure resilience across the team
27.	Any other duties commensurate with the role, grade, and purpose of the post

This Job Description is not definitive and outlines key accountabilities – colleagues are expected to be flexible regarding their accountabilities and will from time to time be asked to carry out other duties to ensure achievement of organisational goals.



Person Specification

Qualifications	Essential or Desirable
NVQ Level 3 (or equivalent) or extensive work-related experience in the relevant field	E
Part qualified AAT / ACA / ACCA / CIMA / CIPFA or equivalent or willingness to undertake relevant finance qualification	D
Skills	Essential or Desirable
Strong analytical skills with excellent numeracy skills, attention to detail and time management skills	E
High level of communication skills, both oral and written with attention to detail and accuracy	E
Proficient in Microsoft Office programmes	E
Experience of using financial management systems	D
Experience of using Xero Accounting Software	D
Knowledge / Experience	Essential or Desirable
Experience of working within the Education sector	E
Knowledge and understanding of Academy finance and functions	E
Awareness of statutory education system and associated legislation relating to financial services for Trusts.	E
Knowledge of Teachers Pensions and Local Government Pension Scheme (LGSP)	D
Working knowledge and experience of working within the education sector	D
Awareness of child protection / safeguarding issues	E
Proven record of collaborative working with Executive/Senior Management and external stakeholders	E