

Job Description for the Post of Senior Finance Business Partner

Reporting to: Head of Finance Business Partners

Line Managing Responsibilities: Assistant Finance Business Partner & Finance Officer

Working with: Head teachers, Financial Accountant, Senior Finance Officer, HR Business Partners & Finance Directors

Job Purpose:

To oversee the financial management for a number of Academy Hubs and support other Orchard Hill College Academy Trust “family” financial management and strategic needs as required. To be the key finance lead for the schools, seeking to add value to the development plans and any key financial changes that will impact the pupils and school. To be active and challenge in the decision making of all major projects and opportunities.

Key Responsibilities:

- To attend a weekly SLT forum ensuring best practices are being followed within the organisation whilst been proactive and agile in the work place to support decision making to support school development plans.
- Specialist lead in Fixed Asset/Income/ Modelling and other projects as they arise.
- Be the school Principal's key finance contact for management of finances and development planning. Manage monthly meetings with Principals with key financial updates.
- Provide an overall financial management overview to ensure that the schools can plan, resource adequately and deliver the best outcomes for learners in year and going forward.
- Lead on the relationship with the school's local authority ensuring accurate and update banding requirements are met in line with High Needs Operational Guidance. Ensure that a proactive relationship is maintained to enable easy resolution of issues arising and a platform for healthy negotiations if funding arrangements are reviewed.
- Attend School Forums or high needs equivalent forums at the Local Authority, adding support to the school, ensuring our schools are represented.
- Lead on the partnership with Local Governing Bodies (LGB) as the finance liaison. Leading and discussing the financials for the school.
- Review and present the monthly management accounts model including profit & loss and balance sheet to regular deadlines, including commentary on key variances to the budget holders and senior leadership team.
- Lead on and support the five-year school development plans aiding the schools to cost up their proposals.
- Manage on boarding of new schools via conversions or introduction of free schools and integrate into the different reporting modules.
- Ensure all schools use the software packages (Arbor) effectively to ensure efficient invoicing for pupils and easy follow up of queries.
- Liaise with the school regarding its Estates Strategy ensuring both financial viability and Finance Regulations are followed. Ensure that financial information is consistent in all plans and reflect accurately current developments planned.
- Represent Finance at special project meetings ensuring that the project strategy is compliant with Financial Regulations and Financial viability.
- Present financials at the monthly Risk and Review meetings highlighting opportunities and risks. Discuss any concerns that may impact the performance of the school.

- Ensure financial forecasts are robust and reflect the most likely outturn i.e. are not overly pessimistic/optimistic.
- Review key accounts monthly and update any discrepancies.
- Liaise with Senior Finance officer to discuss any issues identified in the purchase ledger.
- Support Finance accountant with Cashflow information and Statutory Accounts schedules.
- Work collaboratively with HR Business Partners and School Business Managers/Office Managers
- All aspects of line management for one or more Assistant Finance Business Partners
- Line Management of Finance Officers (FO), ensuring Arbor is correct.
- Manage the FO to produce income data dashboards.
- Deputise for the Head of FBP as required.
- Review grants and ensure funds are allocated and managed in accordance with guidelines.
- To meet and support budget holders with monthly accounts, with particular attention to student numbers, income, HR and staffing resources, to problem solve where there are budget variances with the relevant manager. To advise the Head FBP where there are concerns.
- Completion and reporting of financial models for annual budgets, five-year plans, and other financial planning information for the academies.
- Manage academies risks and support as agreed with Head of FBP
- To carry out ad hoc projects as required by Executive Senior Leadership Team.
- To maintain information in a confidential manner, following data protection regulations.
- To make regular visits to the academies and other sites as needed to ensure the smooth running of the team and functions.
- Manage team of Business partners/Finance assistants to deliver the following.
- Ensure HR database provides accurate financial information to support budget management through monthly reconciliations.
- To authorise bank payments to support the hubs, for PL, Payroll and Adhoc
- Oversee and support HR function with live vacancies and budget planning.
- To undertake Continuing Professional Development (CPD) and training to update own skills and knowledge.
- To carry out all duties in accordance with College and OHCAT policies, including the Equality and Diversity Policy, Safeguarding policies and Health and Safety Policy.
- This is a new role and there will be a need for flexibility as the role is established and embedded in the organisation. The list is not by any means complete and other tasks may be required as deemed necessary.

Additional notes

- Job Descriptions are to be reviewed annually
- The responsibilities listed above are the essentials of the post; it is always open to the postholder to propose ways of extending these responsibilities

Person Specification for the Post of Senior Finance Business Partner

The Person Specification shows the abilities and skills you will need to carry out the duties in the Job Description. Shortlisting is carried out based on how well you meet the requirements of the Person Specification. You should mention any experience you have had which shows how you could meet these requirements when you fill in your Application Form. If you are selected for interview, you may be asked also to undertake practical tests to cover the skills and abilities shown below.

Area	Requirements	Essential/Desirable
Qualifications	Part-qualified accountant (ACCA, CIMA, ACA, CIPFA etc.) or qualified by experience	Essential
	Fully qualified accountant	Desirable
Experience	Significant accounting experience including costings, financial management and control	Essential
	Finance Business partnering experience	Essential
	Experience of preparing and presenting monthly financial information (P&L, Balance Sheet & Cashflow)	Essential
	Experience of supervising and developing junior team members	Essential
	Budgeting & Forecasting production experience	Essential
	Education Sector Experience	Desirable
	Experience of direct line management	Desirable
	Good understanding of the Education sector and current issues & trends	Essential
Knowledge & Understanding	Understanding of education finance and funding streams	Desirable
	A good understanding of the work of a Multi-Academy Trust and school	Desirable
	An understanding of safeguarding requirements and best practice	Desirable
Skills & Abilities	Ability to communicate financial information and concepts to non-finance stakeholders	Essential
	Ability to build relationships with and form trusted partnership with internal stakeholders	Essential
	Continuous Improvement mindset with a want to make positive changes	Essential
	Proficient in Excel & other Microsoft Packages	Essential
	Excellent organisational & time management skills	Essential
	Flexible and adaptable to change in the environment of work	Essential
	Ability to use initiative and manage own workload	Essential
	Ability to work under pressure to meet deadlines whilst maintaining accuracy	Essential
	Experience in working with external partners	Desirable
	Demonstrable track record of process improvement	Desirable
	Experience working with Sage or similar financial packages	Desirable
Personal Attributes/Other Requirements	Commitment to promote the Equality and Diversity, Safeguarding and Health and Safety Policies and other OHC&AT policies.	Essential
	Regular travel required to schools	Essential
	Driving license and own vehicle	Desirable
	Proactive, solutions-focused and adaptable in a changing environment.	Essential
	Strong communicator able to influence and build effective relationships	Essential
	Confident representing Finance at senior levels and external forums.	Essential
	High integrity with a commitment to accuracy, confidentiality and good governance.	Essential

	Strong leadership skills with the ability to support and motivate a team.	Essential
	Calm under pressure, able to manage a complex workload and meet deadlines.	Essential
	Committed to continuous improvement and positive outcomes for learners.	Essential

Orchard Hill College & Academy Trust is proud to be a Disability Confident Employer, committed to creating an inclusive and supportive workplace for all.

Orchard Hill College & Academy Trust endeavour to make any necessary reasonable adjustments to the job and the working environment to enable access to employment opportunities for disabled job applicants or continued employment for any employee who develops a disabling condition.

*This **Job Description** and **Person Specification** is current but will be reviewed on an annual basis and following consultation with you, may be changed to reflect or anticipate changes in job requirements which are commensurate with the job title and grade in line with the school's changing needs.*

*In line with the statutory guidance in Keeping Children Safe in Education, the Trust reserves the right to request and review references **prior to interview** as part of our safer recruitment process. Any concerns raised will be followed up with the applicant before a recruitment decision is made.*