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| Job title: | Finance Business Partner |
| Grade: | Grade 11 (Scale point 28 to 34) |
| Reports to: | Trust Finance Manager |

Main job purpose

Supporting the strategic development of each designated school by working closely with the leadership to enable effective decision making and achievement of the school's aims.

Providing high quality strategic financial planning to ensure that the School/Trust makes best possible use of resources and is able to provide the best outcomes for pupils.

Maintain and monitor the efficient management of the designated schools' budgets.

Maximising income generation and supporting development of grant applications.

Main responsibilities and duties

Financial Management

Using tools such as Integrated Curriculum Financial Planning, you will work with Senior Leaders to develop a strategic plan for the staff and resources of each designated school.

Prepare a five-year financial plan for each of the designated schools and as part of this exercise to prepare the annual budgets which support the financial plan.

Monitor and maintain up to date budget and forecast figures for each designated school using the Trust's budgeting software, IMP.

Meet regularly with the school leadership to discuss monthly management accounts reports.

Meet with budget holders as necessary to discuss budget spend.

In conjunction with other leaders, support the planning and implementation of capital purchase programmes.

Prepare financial reports, estimates and completion of financial returns as required

Ensure the effective operation of financial controls within the designated school and ensure they receive value for money for all expenditure.

Meet regularly with key staff in the Finance Team to ensure consistency of approach in budgeting and forecasting across all schools.

Work with key finance staff and the Trust auditors to support the audit requirements for each school, ensuring that information is timely and accurate.

Work with the Trust Finance Manager to oversee the enhancements of financial procedures within the Trust that are in line with the agreed financial practices.

Ensure all staffing requirements are accurately reflected in budgets and forecasts (including monthly reconciliations of payroll), providing challenge and support where necessary to ensure best possible outcomes for the school.

Ensure accuracy of management accounts, working with the finance team.

Play an active role in ensuring department KPIs are met on a monthly basis and work with the finance team to continuously improve the service we deliver to all stakeholders/customers.

Explore income generation opportunities for the schools, including support with bid-writing and support establishing and managing lettings.

HR & Payroll

Support the strategic recruitment plan within each school ensuring that staffing decisions are factored into the relevant school's budget.

Assist the Senior Leadership Team in the development of a staffing structure that meets financial considerations

Ensure all relevant parties are aware of changes to staffing, in order that systems can be updated as necessary

Administration

Work with school Office Managers to establish efficient and effective working practices making best use of technology where possible.

Other

Contribute to the Trust's culture and development by:

Sharing good financial practice across the Trust and designated schools.

Be an active and visible member of each school's community whilst developing partnerships and collaboration between the schools.

Supervision and management

The post holder will often be required to work without direct supervision. Supervision will be present where necessary.

Decision making

The post holder will be required to make informed decisions .

Problem solving and creativity

Deals with changing and conflicting deadlines and frequent interruptions to work, supervision of staff and allocation of work.

Key contacts and relationships

Daily contact by telephone/face to face with Headteacher/Staff and other external stakeholders to the Trust.

Resources

General Office equipment, laptop etc.

Working environment

This is a strategic post and there will be considerable conflicting work demands, deadlines and interruptions.

Significant travel, regular visits to schools as well as meetings and events. There will be a requirement to spend large amounts of time working on complex and highly sensitive information, financial reporting, change management programmes.

There may be exposure to demanding situations involved in managing change.

General and School Responsibilities

- Be familiar with Safeguarding requirements in protecting the welfare of children, and young people. The Trust is committed to safeguarding and promoting the welfare of children and expects all staff and volunteers to share this commitment.
- Contribute to and support the Trust's Values, Ethos and Vision
- Participate in training and other learning activities as required
- Participate in Performance Management and development as required by the Trust's policies and procedures
- Participate actively and flexibly in a range of school activities
- Be aware that all employees have a general duty in law to take reasonable care for the health and safety of themselves and of other persons who may be affected by their acts or omissions

- Understand and be committed to the Health and Safety Policy and the safety priorities and be aware of their contribution to such priorities
- Be aware of and comply with the health and safety legislation and other requirements that are relevant to the post
- Demonstrate commitment and enthusiasm to promote the principle of equality and diversity in employment and service delivery
- Be familiar with and promote the Equality and Diversity Policy

The principal responsibilities and tasks as set out above are not intended to be exhaustive. The need for flexibility, accountability and team working is required. The post-holder is expected to carry out any other related duties that are within the employee's skills and abilities, commensurate with the post's grade and whenever reasonably instructed.

The job description will be reviewed regularly to ensure that it relates to the role being performed and to incorporate reasonable changes that have occurred over time or are being proposed. This review will be carried out in consultation with the post-holder before any changes are implemented.

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| Job description prepared by: | Rachael Page |
| Date: | February 2025 |

| Requirements | Essential | Desirable | Evidence |
|-----------------------------------|---|---|---|
| Qualifications | <u>Example:</u> <ul style="list-style-type: none"> 5 GCSEs including English and Maths (minimum level 4 or equivalent experience/ vocational qualification) | Any other relevant qualifications | Application Form |
| Knowledge & Experience | <ul style="list-style-type: none"> Experience of working at School Business Manager level or equivalent. Good general knowledge of finance Strong working knowledge of academies. Experience in budget management and/or budget setting | Experience working with Xero for Education and/or IMP. | Application Form Interview References |
| Skills | <u>Examples:</u> <ul style="list-style-type: none"> Excellent numeracy and analytical skills Strong communication and interpersonal skills Excellent working knowledge of spreadsheets. Strong ICT skills. Experience of explaining financial matters to non-financial personnel. Fluency in English for all student and public-facing roles. Able to work under pressure and prioritise workload. | | Application Form Interview References Language Qualifications Fluency in English evidenced by: <ul style="list-style-type: none"> competently answering interview questions in English; possessing a relevant qualification for the role attained as part of education in the UK or fully taught in English by a recognised institution abroad passing an English language competency test or possessing a relevant spoken English qualification at CEFR Level B1 or above, taught in English by a recognised institution abroad |
| Personal Qualities | <ul style="list-style-type: none"> Tenacity Flexible and adaptable Ability to work on your own initiative. Able to work well within a team. Able to work accurately and with attention to detail | <ul style="list-style-type: none"> Negotiation and influencing skills. Willing to develop personal skills through training. | Application Form Interview References |
| Relationships | <u>Examples:</u> <ul style="list-style-type: none"> Have positive and mutually supportive relationships with all colleagues Ability to promote the school across the wider community | | Application Form References Interview |
| Safeguarding | <u>Examples:</u> <ul style="list-style-type: none"> Good knowledge of relevant Safeguarding procedures | <u>Examples</u> | Application Form Interview References |

| Requirements | Essential | Desirable | Evidence |
|--------------|---|---|----------|
| | <ul style="list-style-type: none"> Commitment to adhere to the Trust's Safeguarding & Child Protection Policy. | <ul style="list-style-type: none"> Good awareness of potential Safeguarding issues | |