



### Job Description

Role	Finance Business Partner	School/Department	Shared Services
Grade	Grade 9 SCP 35 – 40	Reports to	CFO
Purpose	The Finance Business Partner supports the strategic and financial planning of their allocated academies, working closely with Headteachers and the Chief Financial Officer to enable effective decision-making. The postholder provides professional financial insight to ensure resources are used efficiently and sustainably, and is responsible for the accurate management and monitoring of academy budgets in line with Trust priorities and regulatory requirements.		
Scope	Staff responsibilities:	Financial Accountability:	
	yes	yes	
Key accountabilities	<ul style="list-style-type: none"><li>• Lead the financial planning, budgeting, and monitoring for a selection of schools within the Trust, ensuring delivery of balanced budgets and long-term financial sustainability.</li><li>• Provide strategic financial insight and advice to Headteachers and senior leaders to support effective decision-making and resource allocation.</li><li>• Ensure compliance with Trust financial procedures, the Academies Trust Handbook, and statutory and audit requirements.</li><li>• Oversee SEN and high-needs funding arrangements, maintaining effective relationships with local authority SEND and finance teams to secure appropriate funding.</li><li>• Ensure that financial resources, contracts, and income streams across the hub are managed effectively and deliver value for money, supporting efficient use of public funds.</li></ul>		
Relationships	The postholder will build positive, professional relationships with a wide range of stakeholders, including Trust and school leaders, colleagues across Maiden Erlegh Trust, students, parents and carers, plus external partners. These relationships are central to creating a collaborative, supportive environment that enables shared success and strong outcomes for all.		
Supporting Maiden Erlegh Trust	The postholder may occasionally support other Maiden Erlegh Trust schools, promoting collaboration, professional growth, and the sharing of effective practice. This cross-Trust work provides		



	opportunities to learn from colleagues, contribute to improvement initiatives, and strengthen our community.
<b>Main duties and accountabilities</b>	<p><i><b>Strategic and Financial Leadership</b></i></p> <ul style="list-style-type: none"><li>• Act as the strategic finance lead for allocated schools, providing financial insight, challenge, and advice to Headteachers and senior leaders to support effective decision-making.</li><li>• Lead the preparation of medium-term (3–5 year) financial plans aligned with Trust and school improvement priorities.</li><li>• Develop a deep understanding of each school’s financial position, drivers, and risks to ensure sustainable budgeting and resourcing.</li><li>• Undertake financial modelling and scenario planning to support strategic decisions, including curriculum design, staffing structures, and growth planning.</li><li>• Provide clear, evidence-based recommendations to support resource allocation and financial sustainability.</li><li>• Support the delivery of Trust-wide strategic initiatives, contributing to long-term financial planning and improvement work.</li></ul> <p><i><b>Financial Management and Reporting</b></i></p> <ul style="list-style-type: none"><li>• Lead the preparation and monitoring of annual budgets for allocated schools, ensuring alignment with Trust priorities and local context.</li><li>• Accountable for ensuring the financial resources of the allocated schools are applied efficiently and effectively, with the support of the Trust’s Finance team, to ensure that:<ul style="list-style-type: none"><li>○ All income and expenditure are accurately reflected in the monthly management accounts.</li><li>○ Budget holders are supported and challenged to ensure value for money and probity in the use of public funds.</li><li>○ A balanced annual budget is set, and monthly budget monitoring reports are reviewed by the Headteacher, the CFO and the Trust.</li><li>○ All third-party contracts demonstrate best value and are managed effectively in conjunction with CFO and COO.</li></ul></li></ul>



- Income from ancillary services and trading activity is maximised, ensuring accurate documentation, timely invoicing, and efficient cash collection.
- A robust 5-year strategic financial plan is maintained, aligned to the school improvement plan and Trust strategy, using financial planning tools.
- Monthly management accounts are accurate, timely, and clearly understood by school and Trust leaders.
- An Integrated Curriculum Financial Planning (ICFP) dashboard is maintained, with key metrics understood and acted upon by stakeholders.
- All SEN-related income is properly managed, including liaising with Local Authorities to ensure the Trust receives the full funding to which it is entitled.
- Capital funding is monitored and utilised efficiently and effectively in line with Trust priorities and compliance requirements.
- Support the production of the Monthly Performance Report, statutory returns, internal and external audits, and year-end processes.

#### ***Leadership and Team Management***

- Line manage the School Finance Assistant, ensuring consistent financial processes and high standards across all schools.
- Foster a culture of professionalism, collaboration, and continuous improvement within the finance team.
- Provide professional development, coaching, and guidance to finance staff and school-based colleagues with budgetary responsibility.

#### ***Governance, Compliance, and Continuous Improvement***

- Provide accurate and insightful financial reports to Headteachers, CFO and senior leaders as required.
- Ensure compliance with the Trust's financial policies, procurement procedures, and internal control framework.
- Support internal and external audits and ensure that any recommendations are implemented promptly.
- Contribute to the development and refinement of Trust-wide financial systems, reporting, and best practice.



	<b><i>Relationship Management and Communication</i></b> <ul style="list-style-type: none"><li>• Build and maintain strong, trusted relationships with Headteachers and senior leaders to support a culture of financial accountability.</li><li>• Collaborate with colleagues across the Trust to share best practice and promote consistent financial governance.</li><li>• Maintain effective relationships with Local Authority finance and SEND teams to ensure the Trust receives accurate and timely high-needs funding allocations.</li><li>• Communicate complex financial information clearly and accessibly to non-financial colleagues.</li></ul>
<b>Other requirements and responsibilities</b>	<ul style="list-style-type: none"><li>• Enhanced DBS clearance required.</li></ul>

### Person Specification

<b>Role</b>	Finance Business Partner	<b>School/Department</b>	Shared Services
<b>Qualifications, training and education</b>	<ul style="list-style-type: none"><li>• Qualified accountant (ACA, ACCA, CIMA, CIPFA) or equivalent relevant experience.</li><li>• Evidence of continued professional development in finance, accounting, or education sector finance.</li></ul>		
<b>Skills and abilities</b>	<b>Skills and Abilities</b> <ul style="list-style-type: none"><li>• Strong analytical and problem-solving skills with the ability to interpret complex financial data.</li><li>• Advanced Excel skills, including pivot tables, formulas, and data analysis.</li><li>• Proficient in Microsoft 365 applications, including Teams, Word, PowerPoint, and Outlook.</li></ul>		



	<ul style="list-style-type: none"><li>• Have the ability to work under pressure and meet targets and deadlines.</li><li>• Excellent communication and interpersonal skills; able to influence and advise senior leaders and explain financial information to non-finance colleagues clearly.</li><li>• Strong organisational skills and ability to manage competing priorities across multiple sites.</li><li>• Ability and willingness to travel regularly between schools within the hub; full UK driving licence and access to a car required.</li></ul> <p><b>Knowledge and Experience</b></p> <ul style="list-style-type: none"><li>• Proven experience of financial management and business partnering in education, public sector, or multi-site organisations.</li><li>• Experience of managing and leading teams, ensuring consistent application of financial processes across multiple sites.</li><li>• Deep understanding of academy funding frameworks, regulatory compliance, governance, and statutory reporting.</li><li>• Experience of supporting organisational change, school growth, or restructuring.</li><li>• Experience working within a Multi-Academy Trust or school finance environment.</li><li>• Knowledge of SEN/high needs funding, local authority processes, and funding regulations.</li><li>• Experience of system or process improvement, including finance system implementation.</li></ul>
<b>Requirements specific to the role</b>	<p>All staff and volunteers are expected to be committed to safeguarding, equality and promoting the welfare of children and young people.</p> <p>To ensure awareness of local safeguarding policies and procedures and to report any concerns or information received as required</p>

**Maiden Erlegh Trust retains the right to implement changes in job descriptions and person specifications to reflect changes in the demands of the post. Where this is necessary this will be done in consultation with you.**

<b>Signed:</b> <b>Post holder</b>	
<b>Date:</b>	