

Finance Business Partner**Job Description & Person Specification****Trust Function: Finance**

Pay Scale: Scale I

Responsible to: Finance Manager

Responsible for: Up to 3 reports

Overview

The Finance Business Partner role is a senior role within the Finance team and encompasses the skills required to provide a supportive and advisory role to departments within the Trust, and to contribute to the effective operation of the overall finance function.

The Finance Business Partner will work with the finance team to ensure that the Trust's monthly management accounts and underlying financial records are complete and accurate, whilst also working with a range of other internal and external stakeholders to drive value for money as part of the organisation's responsibility to steward and apply public funds effectively and efficiently.

The Finance Business Partner role is a key member of Broad Horizons Education Trust, delivering continuous improvement in the Trust's finance function and developing trusted business partnerships with departmental budget holders (Head Teachers and Central Service leads) and other operational staff. The Business Partner will be responsible for line managing up to 3 members of the Finance team and will themselves report to the Finance Manager.

Roles and Responsibilities**1 Finance team**

- 1.1 Working effectively with other Senior finance management members and all members of the Trust's finance team.
- 1.2 Applying learning gained through accounting qualifications and experience to ensure the team functions effectively and its work meets auditing requirements.
- 1.3 As part of the Senior finance management, ensuring the achievement of the department's objectives, providing guidance to other colleagues as required.
- 1.4 Developing trusted business partnerships with Trust stakeholders through collaborative working and through gaining a good understanding of both the financial and non-financial shared matters of interest.
- 1.5 Liaising with personnel across the organisation and external stakeholders as required and contributing to the shaping of a collaborative Trust culture.
- 1.6 Identifying own training requirements and undertaking training as necessary with support from line manager and other members of the Senior finance management.
- 1.7 Line management of up to 3 members of Finance staff, supporting their own work and development in their roles and responsibilities.

2 Budgeting and procurement

- 2.1 Liaising with budget holders and other Trust stakeholders in the preparation of balanced budgets (to a rolling 3-yearly programme) as a collaborative, co-owned process between budget holders and the centralised finance function.
- 2.2 Proposing budgetary solutions based on trend and benchmarking analysis, and identifying key budget virements.
- 2.3 Contributing actively to the shaping of Trust-wide internal and year-end reporting, taking a significant role with system and process improvements and supporting or leading on specific projects, to enable the embedding of a forward-looking and disciplined approach to managing finances.
- 2.4 Monitoring organisational contracts, Trust procurements and subscriptions and negotiating pricing and discounts, liaising with external contractors and making recommendations to the Senior finance management and departmental budget holders as required for consideration.

3 Reporting and monitoring

- 3.1 Taking an active role in the Trust's statutory financial statements, including the preparation of high quality working papers that underpin them, delegating responsibility for preparatory work as appropriate.
- 3.2 Contributing to the preparation of the Trust's monthly Management Accounts in line with the financial timetable, recommending improvements to the process and reviewing actual and forecast financial information prepared by others.
- 3.3 As part of the Senior finance management, ensuring that suitable training is arranged for budget holders and other operational staff to enable them to manage their budgets and undertake their financial responsibilities effectively.
- 3.4 Taking an active role in capital budgeting and reporting as required.
- 3.5 Preparing financial workings and forecasts as reasonably required by budget holders or the Senior finance management team, supporting the development of proposals for new costs, and providing guidance and advice to budget holders in the process.
- 3.6 Producing reports for the ESFA and other external bodies, including the preparation of high quality working papers that underpin them.
- 3.7 Reconciling monthly payroll records, completing key control account reconciliations and other monthly reconciliations as may be required from time to time.
- 3.8 Collating and preparing statutory reporting and benchmarking data including payment performance reporting, gender pay gap reporting, carbon emissions reporting, VAT reporting, and any other reporting as may be required from time to time.
- 3.9 Ensuring effective debt recovery procedures, with assistance from other Finance and operational staff, on a timely basis.

4 Financial improvement

- 4.1 As part of the Senior finance management, creating and fostering a culture of continuous improvement, identifying sustainable financial improvements, monitoring and managing cost and funding pressures.
- 4.2 Seeking out and developing opportunities for income generation, liaising with operational staff as necessary to realise and progress these.

- 4.3 Ensuring best practice is consistently applied in all areas of responsibility, including own work, line reports' work, the wider Finance team and Trust. Contributing to the shaping and improvement of effective financial reporting.
- 4.4 Identifying and implementing opportunities to increase efficiency and effectiveness, delegating effectively and redesigning processes to remove or reduce tasks that do not add value or advance the Trust's overall objectives.

5 Systems and controls

- 5.1 As part of the Senior finance management, ensuring a sound system of internal control is embedded, highlighting identified deficiencies and implementing improvements.
- 5.2 Ensuring accurate, complete and auditable accounting records are maintained.
- 5.3 Implementing and maintaining Trust-wide financial systems and processes, and ensuring users can access appropriate training and support.
- 5.4 As part of the Senior finance management, ensuring the adherence to financial controls, policies and procedures within the Finance team and across the Trust.
- 5.5 Reviewing and recommending amendments to finance policies and procedures, following relevant research and consultative engagement.
- 5.6 Liaising with Internal and External Audit and maintaining a positive working relationship with the Trust's auditors.
- 5.7 Ensuring sufficient and appropriate procedure notes are maintained.

6 Miscellaneous

- 6.1 This job description is not an exhaustive list of responsibilities and does not cover all individual tasks associated with the role, or tasks which could be reasonably expected by the Trust to be undertaken in relation to the post holder's responsibilities.
- 6.2 It is a requirement of the post holder to make positive efforts to maintain their personal safety and that of others by taking reasonable care, carrying out requirements of the law and following recognised codes of practice. The post holder is also required to be aware of and comply with policies on health and safety.
- 6.3 This job description can be altered, with the agreement of the post holder and will be reviewed on an annual basis.

Person specification and assessment approach

Requirements	Essential	Desirable	Assessed
Qualifications			
4 or more GCSEs at grade C (pre 2017) / grade 4 (post 2017) or above including Maths and English	X		Application
Passes at A level (or equivalent)	X		Application
AAT Level 4 qualification	X		Application
Professional accounting qualification (ACA, ACCA, CIMA, CIPFA)		X	Application

Full UK Driving Licence		X	Application
Experience			
At least 2 years of employment within a finance role/capacity	X		Application
Fully competent in using generic finance ledger systems	X		Interview
Working within a strong team	X		Interview
Working in the education sector		X	Application
Knowledge & Skills			
Good accounting skills and experience covering both financial and management accounts	X		Interview
Strong understanding of financial controls and best practice and how to address deficiencies	X		Interview
Able to efficiently analyse/manipulate large and complex data sets within Microsoft Excel, Google Sheets or other spreadsheet formats	X		Interview
Able to communicate effectively in writing and in person	X		Interview
Able to demonstrate problem solving abilities	X		Interview
Able to form constructive and trusted working relationships with staff at all levels	X		Interview
Able to analyse and evaluate information to derive data-informed decisions and recommendations	X		Interview
Able to communicate financial information with a variety of stakeholders in a straightforward and compelling manner	X		Interview
Able to identify and drive improvements, understanding the potential impact of an improvement and the need for careful planning and appropriate stakeholder consultation	X		Interview
Able to liaise effectively with auditors	X		Interview
Personal Attributes and Others			
A commitment to own continuing professional development	X		Interview
A good team player with the ability to support and motivate others	X		Interview
Able to work on own initiative and meet set, often external, deadlines, modelling an organised approach	X		Interview

Able to maintain confidentiality and professionalism at all times.	X		Interview
Able to actively contribute to a working environment in which where staff at all levels feel able to offer ideas, feedback and constructive criticism	X		Interview

Agreement and review

Signature:

Print Name:

Date: