

## Finance Partner – Job Description

**Reporting to:** Senior Finance Manager

**Liaising with:** Trust Senior Leadership Team (SLT), Head Teachers, other colleagues, Trustees, Governors, NRCDES

**Grade/Salary:** OLOL Grade 6

**Hours of work:** 37 hours per week

### **Core Purpose:**

Working alongside the Trust's Senior Finance Team and to support Headteachers, taking responsibility for the full budget management process for an allocated number of individual academies, ensuring that these academies operate within their allocated budget while meeting their key development priorities.

### **Specific areas of responsibility and key tasks:**

#### **Budget Management**

- Prepare budgets, forecasts and short and medium term financial plans for individual academies within the Multi-Academy Trust.
- Actively monitor performance against the agreed budgets and budget headings, meeting with Headteachers and budget holders and taking prompt appropriate action where necessary to ensure each academy operates within its allocated budget.
- Meet with Headteachers to discuss their school priorities and ensure these are factored into the school's budget planning.
- Prepare and regularly update a staffing budget for an allocated number of schools, reconciling the information to the staffing establishment held within the HR system and ensure that any agreed changes were captured and updated promptly.
- Propose revisions to the budget if necessary, in response to significant or unforeseen developments.
- Ensure transactional data in PS Financials has been processed accurately and update and amend if necessary.
- Produce monthly reports for individual academies, including the preparation of financial information and key performance indicators for internal review and presentation to the relevant committees.
- Updating the Trust's budget management system with the latest pay scale changes, funding rates and coding structures.
- Work as part of the senior finance team, sharing tasks and supporting colleagues with their allocated school budgets to ensure deadlines are met.

- Attend the weekly recruitment panel to assess and authorise school vacancy requests. There may be instances where a quicker response is required, and these requests will need to be considered outside of the meeting.

### **Audit and Compliance**

- Ensure the maintenance of adequate records for audit and compliance purposes.
- Implement any recommendations on financial control from the auditors or Education and Skills Funding Agency.
- Ensure the Multi-Academy Trust and the individual academies are compliant with the Academies Financial Handbook and the Trust's own financial regulations, policy and procedures.
- To support the Finance Director in preparing and submitting annual returns to the Education and Skills Funding Agency, e.g. Budget Forecast Return(s).

### **Financial Efficiency and Value for Money**

- Undertake benchmarking analysis to provide evidence of value for money and to highlight potential opportunities to save money across the Trust.
- Co-ordinate any projects as may be required by the Finance Director e.g. preparing financial projections for projects under consideration, e.g. staffing alternatives, capital developments etc.

### **Additional Duties**

- Sharing and following best practice to improve systems and processes.
- To attend meetings as required.
- To take action to improve outcomes for young people and to support all academies in the Trust to be outstanding.
- To perform any task or duty under the reasonable direction of the Finance Director or another member of the Executive team.

*The Our Lady of Lourdes Catholic Multi-Academy Trust is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment. This post is subject to satisfactory references, which will be requested, prior to interview, an enhanced Disclosure and Barring Service (DBS) check, medical check, evidence of qualifications plus verification of the right to work in the UK.*

*The Trust will 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.*

*Whilst every effort has been made to outline the key duties and responsibilities of the role, it is not an exhaustive list. The duties and responsibilities of the role may vary from time to time, commensurate with and without changing the general character of the duties or the level of responsibility entailed and would not in itself justify a reconsideration of the grading of the post.*

## Person Specification

| <b>A Training and Qualifications</b>                                                                   | <b>Essential</b> | <b>Desirable</b> |
|--------------------------------------------------------------------------------------------------------|------------------|------------------|
| AAT Professional Diploma in Accounting, or able to demonstrate equivalent experience                   |                  | Y                |
| Educated to A Level or above, including a minimum of GCSE (or equivalent) grade C in maths and English | Y                |                  |
| Educated to degree level 2:1 or above in a relevant subject or equivalent professional qualification   |                  | Y                |
| Commitment to ongoing professional development                                                         | Y                |                  |

| <b>B Experience</b>                                                                                | <b>Essential</b> | <b>Desirable</b> |
|----------------------------------------------------------------------------------------------------|------------------|------------------|
| Experience working within a finance function                                                       |                  | Y                |
| Experience of working in a school/educational setting in a financial management role or equivalent |                  | Y                |
| Experience of working in a Multi Academy Trust financial role                                      |                  | Y                |
| Experience of managing complex budgets                                                             | Y                |                  |
| Solid understanding of regulatory frameworks                                                       |                  | Y                |
| Experience of producing and presenting complex reports                                             | Y                |                  |

| <b>C Professional Knowledge and Skills</b>                                                                  | <b>Essential</b> | <b>Desirable</b> |
|-------------------------------------------------------------------------------------------------------------|------------------|------------------|
| Evidence of continuing professional development                                                             | Y                |                  |
| Evidence of providing training and development opportunities to other staff                                 |                  | Y                |
| Ability to manage a varied and complex workload as well as delivering to timescale                          | Y                |                  |
| Ability to produce complex financial information in a logical, user-friendly way                            | Y                |                  |
| Strong ICT skills                                                                                           | Y                |                  |
| Excellent verbal and written communication skills                                                           | Y                |                  |
| Excellent planning and organisation skills                                                                  | Y                |                  |
| Understanding of the funding and financial management arrangements and reporting requirements for academies |                  | Y                |

| D Personal Attributes                                                      | Essential | Desirable |
|----------------------------------------------------------------------------|-----------|-----------|
| Willingness to support Catholic life in schools                            | Y         |           |
| Retain the highest levels of confidentiality                               | Y         |           |
| Emotional resilience                                                       | Y         |           |
| The ability to self-evaluate and reflect                                   | Y         |           |
| Attention to detail                                                        | Y         |           |
| Excellent numerical skills                                                 | Y         |           |
| Integrity and commitment to good governance                                | Y         |           |
| Ability to be respectful and promote equality of opportunity and diversity | Y         |           |

| E Safeguarding                                                                                                  | Essential | Desirable |
|-----------------------------------------------------------------------------------------------------------------|-----------|-----------|
| Understanding of responsibilities of the Trust and schools in ensuring compliance with all relevant legislation | Y         |           |

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