

## Job Description

**Post Title:** Finance Partner

**Location:** Spencer Academies Trust

**Salary/Pay Range:** NJC24 – NJC28

**Hours of work:** Full Time (37 hours per week), All Year Round, Permanent

**Reporting to:** Senior Finance Partner

### Purpose of Role

The post holder will advise and assist the Senior Leadership Team (“SLT”) of their allocated academies to develop financial plans, budgets and forecasts. They will also assist with the monitoring of these budgets by preparing monthly management reports and responding to requests for financial information. This role requires a finance professional who can use support and analysis to become a trusted partner to our academy leaders.

### Main Duties and Responsibilities

Working as part of this important team you will be required to carry out the following duties. The nature of the academy year requires some of these tasks to be done regularly whilst others will be on an annual cycle. The postholder will be expected to use all Trust standard computer hardware and software packages where appropriate. Specific responsibilities include:

#### Finance

Plan, prepare, monitor and evaluate the annual academy budget in consultation with the academy’s SLT by:

- Working in liaison with the academy’s SLT to assist them in the setting the budget each year in line with the relevant budget timetable. This must include a three-year forecast position.
- Providing the SLT with a range of financial and budgetary information as required to enable them to actively manage their budget.
- Carrying out monthly budget monitoring review with Principals/SLT.
- Preparing monthly management information for review by the Senior Finance Partner, Head of Finance and Chief Finance and Operations Officer, to enable preparation of consolidated Trust management information.
- Carrying out regular reconciliation of payroll reports to academy level budgets to ensure accurate budgeting (and to identify payroll issues).
- Assisting with the continued development and implementation of Trust-wide financial policies and procedures in accordance with the Academy Trust Handbook, to improve and monitor a robust system of internal controls.
- Ensuring that all financial deadlines are met to enable timely reporting to the Trust Board, the DfE and other internal and external stakeholders.
- Liaising with the Trust Finance Team regarding transactional activity to ensure accurate posting into the computerised financial systems.
- Preparing for the year end including the preparation of year end journals for processing in line with the relevant year end timetable.
- Supporting the Head of Finance with queries from the external (and internal) auditors, as required.
- Maintaining an awareness of relevant legislation and changes in government policy etc.

#### General

- Work in a professional manner and with integrity and maintain confidentiality of records and information.

- Maintain up to date knowledge in line with national changes and legislation as appropriate to the role.
- Be aware of and comply with all Trust policies including the Employee Code of Conduct, IT, Health and Safety and Safeguarding.
- Participate in the Trust Professional Performance Review process and undertake professional development as required.
- Adhere to all internal and external deadlines.
- Contribute to the overall aims and ethos of the Spencer Academies Trust supporting its values of aspiration, partnership and responsibility, and establish constructive relationships with nominated Academies and other agencies as appropriate to the role.

These above-mentioned duties are neither exclusive nor exhaustive, the post- holder maybe required to carry out other duties as required by the Trust.

**Spencer Academies Trust is committed to safeguarding and promoting the welfare of all our children and young people. Therefore, we expect everyone to share this commitment. All appointments are subject to satisfactory pre- employment checks, including a satisfactory Enhanced criminal records with Barred List Check through the Disclosure and Barring Service (DBS) and the completion of Level 2 Safeguarding training. It is an offence to apply for the role if an applicant is barred from engaging in regulated activity relevant to children (where the role involves this type of regulated activity).**

The Trust and its member academies are committed to promoting equality and diversity in both employment and education provision. We aim to ensure that students, parents, governors, employees, contractors, partners, clients and other stakeholders within the Trust community are treated fairly, and with dignity and respect regardless of Protected Characteristics.

Spencer Academies Trust is a Disability Confident Committed Employer.

Name

Signature

Date

## Person Specification

	Essential	Desirable
<b>Qualifications and experience</b>		
Evidence of financial experience to support the day to day operation of an establishment with financial constraints		✓
Accounting/book keeping qualification (AAT qualification or part qualification)	✓	
Willingness and motivation to participate in any training or development required to improve skills/performance	✓	
Experience of Financial Management Systems and accounting packages	✓	
Experience of working in an education finance environment		✓
Experience of setting multiple year budgets		✓
GCSE at A* - C in English and Mathematics or equivalent	✓	
<b>Knowledge and skills</b>		
Ability to work accurately, with meticulous attention to detail	✓	
Ability to build and form good relationships with colleagues, and other professionals	✓	
Ability to prioritise workload speedily and efficiently	✓	
Knowledge and experience of various software packages i.e. Microsoft word and Excel	✓	
Ability to use budgeting software and interpret the numbers to non-finance personnel	✓	
Excellent verbal and written communication skills	✓	
Understand and interpret requirements accurately, by effective questioning, listening, clarification and recording of information	✓	
<b>Personal qualities</b>		
Excellent interpersonal skills with ability to maintain strict confidentiality	✓	
A diplomatic and patient approach	✓	
An ability to cope with interruptions and remain calm under pressure	✓	
Ability to follow direction and work in collaboration with the finance leaders	✓	
Initiative and ability to prioritise one's own workload to meet deadlines	✓	
A willingness to seek support and advice and an awareness of where to seek it	✓	
Commitment to the Trust's ethos, aims and its whole community	✓	