



## St Ralph Sherwin Catholic Multi-Academy Trust

### Job Description

#### Finance Business Partner

St Ralph Sherwin CMAT is committed to creating a diverse workforce. We'll consider all qualified applicants for employment without regard to sex, race, religion, belief, sexual orientation, gender reassignment, pregnancy, maternity, age, disability, marriage or civil partnership.

**Reporting to:** Senior Finance Business Partner

**Responsible for:** Finance Assistant

**Grade/Salary:** S1 (points 30-34)

**Contract Type:** Full Time

**Hours:** 37 hours per week (additional hours may be required to meet the requirements of the role)

**Location:** Head Office with travel to schools

---

#### Main purpose

To provide financial support and guidance to individual academies within the Trust, ensuring effective budget management, compliance, and clear reporting that supports operational decision-making.

#### Duties and responsibilities

##### Budgeting & Forecasting

- Support the Senior Finance Business Partner in preparing annual budgets and medium-term forecasts.
- Monitor expenditure against budgets, highlighting variances and advising corrective action.
- Assist in scenario planning and sensitivity analysis for school leaders.

##### Management Reporting

- Produce monthly management accounts for assigned academies, with clear commentary.

- Provide variance analysis and recommendations for operational improvements.
- Support preparation of statutory returns and ESFA submissions.

### **Business Partnering**

- Work closely with Headteachers to provide financial guidance.
- Translate financial data into practical advice for non-finance colleagues.
- Support decision-making on staffing, curriculum planning, and resource allocation.

### **Process & Systems**

- Contribute to the development of consistent financial processes across the Trust.
- Support implementation of new systems and provide training to staff.
- Promote efficiency and accuracy in financial operations.

### **Stakeholder Support**

- Provide training and support to non-finance staff on financial procedures.
- Build collaborative relationships to embed financial accountability at school level.
- Act as the first point of contact for finance queries within assigned academies.

### **Wider Responsibilities**

- Be aware of and comply with the academy's Child Protection and Safeguarding Policy, Health and Safety Policy, Equality Information and Objectives Policy, Data Protection Policy and any other relevant policy and procedure. Directing any questions about policy and procedure to the Chief Financial Officer
- Comply and assist with the development of policies and procedures relating to Business Partnering, as required.
- Develop effective professional relationships with colleagues.
- Be aware of and support difference and ensure equal opportunities for all stakeholders accepting the principles underlying the school's Equal Opportunities Policy and practice.



# St Ralph Sherwin

Catholic Multi Academy Trust

- Maintain confidentiality of the school, its pupils, and parents, acting in accordance with the school's Confidentiality Policy at all times.
- Contribute to and support the overall Catholic vision and ethos of the school.
- Attend and participate in relevant meetings as required.
- Participate and engage in training and appraisal as required.
- Undertake additional duties as reasonably requested by senior staff.
- Be committed to safeguarding and promoting the welfare of children and young people.

The Finance Business Partner will be required to safeguard and promote the welfare of children and young people, and follow school policies and the staff code of conduct.

Please note that this is illustrative of the general nature and level of responsibility of the role. It is not a comprehensive list of all tasks that the postholder will carry out. The postholder may be required to do other duties appropriate to the level of the role, as directed by the headteacher or line manager.



## Person Specification

### Senior Finance Business Partner

Key: I = Interview A = Application Form

		Essential	Desirable	How evidenced?
<b>Qualifications and Training</b>	Qualified or part-qualified accountant (ACA, ACCA, CIMA).	✓		A
<b>Experience</b>	Proven experience in financial management, planning, and reporting within education, public sector, or not-for-profit organisations.	✓		A / I
	Experience of preparing budgets, forecasts, and monthly management accounts.	✓		A / I
	Track record of supporting non-finance colleagues with financial decision-making.	✓		A / I
<b>Skills and Knowledge</b>	Experience of working with financial systems and reporting tools.	✓		A / I
	Ability to present financial information clearly to non-financial stakeholders.	✓		A / I
	Understanding of school funding arrangements and education sector finance.	✓		A / I
<b>Personal Qualities</b>	Flexible in terms of working hours and duties	✓		I
	Strong attention to detail and accuracy in financial reporting.	✓		
	Organised and able to manage competing priorities in a fast-paced environment.	✓		
	Able to communicate effectively	✓		I
	Uphold and promote the Catholic ethos and values of the school	✓		I
	Commitment to maintaining confidentiality at all times	✓		I
	Commitment to safeguarding, equality, diversity and inclusion	✓		I



# St Ralph Sherwin

Catholic Multi Academy Trust

## Notes:

This job description may be amended at any time in consultation with the postholder.

Add any other notes of relevance to the role/this document.

**Last review date:** 29 January 2026

**Next review date:**

**Headteacher/line manager's signature:**

---

**Date:**

---

**Postholder's signature:**

---

**Date:**

---