Fioretti Trust
Aspiration Wisdom Compassion

School Finance Partner

Job Title:	**School Finance Partner**
Salary:	**GR4: 23-31**
Hours:	**36.5 hours per week, Term Time + 3 weeks**
Contract Type:	**Permanent**
Reporting to:	**Head of Finance**

Main Purpose:
The School Finance Partner works closely with Headteachers, senior leadership teams and school-based finance administrators to provide expert financial management, reporting and business partnering support across their linked schools, ensuring full compliance with the Academy Trust Handbook and wider legal and regulatory requirements. Reporting to the Head of Finance, the post holder acts as a trusted financial partner to Headteachers – providing timely, accurate information and constructive challenge to support good financial decision-making, effective use of resources, and the delivery of Integrated Curriculum Financial Planning (ICFP) across their schools.

Duties and responsibilities

1. *Management Accounts*

- Prepare monthly income and expenditure reports on an accruals basis, including analysis of significant variances against the school budget.
- Hold monthly meetings with the Headteacher or other school senior staff/budget holders as required, to review I&E reports and identify any follow-up actions.
- Meet monthly with the Head of Finance to review I&E reports ahead of consolidation.
- Monitor income and expenditure relating to SEND top-up funding, ensuring schools are maximising income and managing provision within budget.
- Reconcile actual payroll costs to school budgeted costs monthly, following up variances where required.

2. *Budgets and Forecasts*

- Assist school Headteachers in setting a three-year budget plan for inclusion in the Trust's Budget Forecast Return (BFR), using centrally set assumptions, including attendance at meetings with the Central Trust team.
- Update annual budgets for significant in-year changes to income, pay and non-pay, to ensure accurate forecasting of the school's financial position.
- Support Headteachers with scenario modelling where appropriate.
- Upload budget and forecast scenarios to Access Education Finance in line with the Trust timetable.
- Complete benchmarking activity, focusing on Integrated Curriculum Financial Planning (ICFP), and work with Headteachers to ensure staffing and resources are allocated efficiently against curriculum need.

3. *Financial Controls*

- Review period-end debtors and creditors to ensure these are accurately reflected on the balance sheet.
- Process code correction journals as required.

- Maintain the school's asset register, ensuring it is reconciled to the balance sheet.
- Ensure month-end schedules for assets and liabilities are reconciled to the balance sheet and have robust audit evidence.
- Ensure that any school-managed services are correctly invoiced.

4. *School Activities and Income*

- Review trips and school activities to ensure they are correctly accounted for and affordable, providing activity reports to stakeholders as required.
- Ensure donations from parents and school funds are correctly accounted for.
- Review parental debts and ensure correct action is taken in line with Trust policy.

5. *Banking, Payments and Receipts*

- Monitor the use of purchase cards to ensure this is in line with the Trust Finance Policy, and that transactions are correctly recorded and accounts reconciled to the balance sheet.
- Monitor the online cashless payments system to ensure all payments are claimed and recorded correctly.

6. *Business Partnering and Central Support*

- Support central finance reporting as required, including the preparation of papers for Trust Board/Finance, Audit & Risk (FAR) Committee meetings.
- Assist in the external audit and internal scrutiny processes, and with external reporting, as required.
- Carry out finance training with school staff.
- Assist with procurement, ensuring best value is achieved in purchasing.
- Liaise with the central Finance Team as appropriate.
- Carry out any other related activities on an ad-hoc basis as directed by the Headteacher, Head of Finance or CFO.

Employee responsibilities

- Be committed to the safeguarding and promotion of the welfare of children and young people.
- Comply with the policies and procedures relating to child protection, health and safety, security, confidentiality and data protection, equal opportunities, reporting all concerns to an appropriate person.
- Take appropriate action to identify, evaluate and minimise any risks to health, safety and security in the school working environment. Ensure all tasks are carried out with regard to Health and Safety.
- Adhere to the overall ethos, work and aims of the school. Promote the agreed vision and aims of the school. Set an example of personal integrity and professionalism.
- Establish constructive relationships and communication with all staff and other agencies/professionals. Recognise own strengths and areas of expertise and use these to advise and support others.
- Participate in training and other learning activities and performance development as required. Act at all times in a manner appropriate to the seniority of the post.
- Any other duties as commensurate within the grade in order to ensure the smooth running of the school.

Supervision received

- Works under the direction of the Chief Finance Officer. - Plans own work to ensure the meeting of defined objectives, working within an established framework, with regular contact with the CFO to review management accounts and forecasts.

Supervision given			
Post title:	N/A	**No of posts:**	N/A

Notes:
Please note that this list of duties is illustrative of the general nature and level of responsibility of the role. It is not a comprehensive list of all tasks that this 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 CFO.

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

Signed: ______________________________

Name: ______________________________

Date: ______________________________

Person Specification

Essential	Desirable	Where tested: A – application I – interview T – test or activities C – certificate
Qualifications		
GCSE English and Maths (grades 9–4 / A*–C) or equivalent.		**A / C**
Working towards, or holds, a recognised accounting qualification (e.g. AAT, CIMA, ACCA or CIPFA).		**A / C**
Experience		
Experience of working in finance, ideally in an educational setting.	Experience of working within a multi-academy trust.	**A / I**
	Experience of managing or supervising staff.	**A / I**
Knowledge & Skills		
An ability to fulfil all spoken aspects of the role with confidence using the English Language as required by Part 7 of the Immigration Act 2016.		**A / I**
A good standard of education, particularly in English and Mathematics.		**A / I**
Knowledge of the legal and organisational requirements for maintaining the health, safety and security of self and others in a school environment.		**I**
Ability to manage conflicting priorities and self-motivate in managing workload.		**I**
Ability to work effectively within a team and communicate confidently with staff at all levels.		**I**
Ability to review working practices to achieve continuous improvement.		**I**

Ability to work within, and apply, all school policies (e.g. behaviour management, child protection, Health and Safety, Equal Opportunities).		**I**
Working knowledge of Integrated Curriculum Financial Planning (ICFP) and its application to staffing and resource allocation.	Experience of using Access Education Finance or a similar financial management system.	**A / I**
Personal qualities		
Commitment to promoting the ethos and values of the Trust and getting the best outcomes for all pupils.		**I**
Commitment to acting with integrity, honesty, loyalty and fairness to safeguard the assets, financial probity and reputation of the school.		**I**
Ability to work under pressure and prioritise effectively.		**I**
Commitment to maintaining confidentiality at all times.	Deals with difficult situations effectively; embraces change.	**I**
Commitment to safeguarding and equality.		**I**
DBS Clearance required (Enhanced, with Children's Barred List check).		**C**