

## **Job Description: Senior Finance Partner – FP&A, Innovation, Projects & Procurement**

### **Role Summary**

Leads Trust-wide financial planning and analysis (FP&A), innovation, strategic projects and procurement, providing high-quality forward planning, forecasting, scenario modelling, commercial insight and strategic financial leadership across St Gabriel the Archangel CMAT.

Provides strategic oversight of the Trust's procurement function, ensuring procurement activity is commercially robust, compliant and focused on securing sustainable value for money. Directly line manages and develops the Procurement Manager, providing strategic direction while ensuring effective delivery of the Trust's procurement strategy, category management approach, procurement pipeline and contract management framework.

Drives the development of an insight-led performance culture and leads finance contributions to major transformation programmes, including the mobilisation and continuous improvement of Finance Shared Services and improvements to financial systems, reporting, data, automation and procure-to-pay processes.

Serves as the direct line manager and professional mentor for the Senior Financial Planning Analyst and Procurement Manager. Acts as the Trust's finance champion, building financial and commercial literacy across the organisation and equipping local and regional governors with the training and insight required for effective strategic oversight.

### **Core Accountabilities**

- **Strategic Leadership:** Provide strategic leadership for FP&A, innovation, projects and procurement, acting as the Trust's senior finance lead for these disciplines and ensuring they support the Trust's strategic objectives and long-term financial sustainability.
- **Team & Line Management:** Directly line-manage, develop and performance-manage the Senior Financial Planning Analyst and Procurement Manager, providing clear strategic direction and cultivating a culture of high professional standards, service excellence, commercial awareness, accountability and continuous improvement.
- **Financial Planning & Insight:** Lead Trust-wide budgeting, forecasting, scenario modelling and financial analysis, ensuring senior leaders and governors have timely, accurate and forward-looking insight to support strategic decision-making.
- **Procurement & Commercial Leadership:** Provide strategic oversight of the Trust's procurement function, ensuring procurement activity is compliant, commercially robust and aligned with organisational priorities. Lead the development of effective procurement strategies, category management, supplier relationship management and contract management arrangements to secure sustainable value for money.
- **Innovation & Transformation:** Lead major finance transformation and improvement initiatives, using technology, automation, artificial intelligence and data to improve efficiency, control, insight and service quality.
- **Project Leadership:** Lead and govern complex finance-owned and cross-Trust projects, ensuring clear objectives, robust governance and successful delivery to time, cost and quality.
- **Governance & Compliance:** Ensure robust governance, internal controls and compliance with Trust financial regulations, relevant procurement requirements, ESFA requirements and the Academies Trust Handbook.

- **Shared Services:** Support the design, mobilisation and continuous improvement of the Trust's Finance Shared Services model, standardising processes, strengthening controls and improving efficiency, service and insight.
- **Stewardship & Value for Money:** Work collaboratively with Trust leaders, academy Principals and operational teams to deliver strong financial stewardship, commercial effectiveness and demonstrable value for money.
- **Governance Championship:** Act as a key bridge between the finance directorate and wider governance, demystifying school finance and advocating transparent, driver-based financial planning and effective commercial scrutiny.
- **Executive Support:** Contribute to Trust-wide finance leadership priorities and deputise for the Chief Finance Officer as required.

## Specific Responsibilities

### Financial Planning, Forecasting, Insight and Treasury

- **FP&A Leadership:** Lead the Trust-wide FP&A function, establishing a forward-looking approach to financial planning that enables early identification of risks, opportunities and strategic choices.
- **Senior Financial Planning Analyst Oversight:** Directly supervise and develop the Senior Financial Planning Analyst, setting priorities and directing their work towards strategic Trust priorities, corporate reporting deadlines, automation and enhanced financial insight.
- **Budgeting & Medium-Term Planning:** Lead the Trust's annual budgeting process, medium-term financial planning and in-year forecasting, ensuring robust assumptions, clear accountability and alignment with strategic priorities.
- **Strategic Scenario Modelling:** Develop sophisticated scenario modelling covering pupil numbers, staffing structures, pay awards, inflation, funding changes, investment decisions and other significant financial variables to support executive decision-making.
- **Corporate Reporting:** Create and continually enhance monthly budget and forecast reporting covering income and expenditure, balance sheet, cash flow, KPIs, risks and opportunities, providing sharp analytical insight into the major drivers of Trust performance.
- **Driver-Based Planning:** Establish and embed driver-based financial planning across the Trust, reducing reliance on historic incremental budgeting and ensuring resources are aligned with strategic and educational priorities.
- **Systems Reconciliation:** Working with the Senior Finance Partner – Business Partnering, oversee the payroll-to-budget software reconciliation process, ensuring forecasts accurately reflect current staffing establishments and expenditure commitments.
- **Reporting Automation:** Pursue automation of financial reporting and analysis, reducing manual production activity and increasing capacity for interpretation, challenge and strategic insight.
- **Treasury Strategy Implementation:** Lead the implementation of the Trust's strategic treasury management policy, optimising cash balances, evaluating counterparty and investment risks and maximising returns within approved risk parameters and regulatory requirements.
- **Cash Flow Modelling:** Prepare and maintain comprehensive short, medium and long-term cash flow forecasts to support treasury investment decisions, funding cycles, strategic investment and financial resilience.

## Innovation, Transformation and Complex Projects

- **Strategic Project Leadership:** Lead major finance-owned and cross-Trust transformation projects, establishing clear objectives, governance, delivery plans, benefits realisation and accountability.
- **Month-End Timetable Reduction:** Lead strategic projects focused on optimising and accelerating the financial close cycle, reviewing end-to-end month-end processes to eliminate bottlenecks, automate reconciliations and significantly reduce the timetable for issuing monthly management accounts.
- **AI & Automation Integration:** Identify, evaluate and pilot the responsible use of artificial intelligence, machine learning and automation tools within finance and procurement to improve data extraction, reconciliations, anomaly detection, predictive forecasting, reporting and process efficiency.
- **Financial Management System Transition:** Lead the scoping, data migration, configuration and implementation of upgrades or changes to the Trust's central financial management system, ensuring effective governance and minimal operational disruption.
- **Procure-to-Pay Automation:** Lead the end-to-end implementation and optimisation of automated purchase-to-pay solutions, streamlining purchasing, digital approvals, invoice processing and expenditure controls across all academies.
- **Project Governance:** Create and enforce a robust project governance framework for finance-owned projects, ensuring clear sponsorship, scope, responsibilities, milestones, risk management and delivery to agreed time, cost and quality standards.
- **Benefits Realisation:** Ensure transformation and investment projects have clearly defined financial and non-financial benefits, with arrangements to monitor whether expected outcomes and efficiencies are delivered.
- **Change Management & Adoption:** Work with stakeholders across the Trust to support successful implementation and adoption of new systems, processes and ways of working.
- **Policy & Framework Ownership:** Lead cross-Trust financial development initiatives, including the Scheme of Financial Delegation, finance policies, strategic frameworks and operational benchmarking.

## Procurement & Commercial Leadership

- **Procurement Manager Oversight:** Directly line-manage, develop and performance-manage the Procurement Manager, setting clear strategic priorities and ensuring effective delivery of the Trust's procurement strategy and annual procurement programme.
- **Procurement Strategy:** Lead the development, implementation and continuous improvement of the Trust-wide procurement strategy, ensuring alignment with organisational priorities, financial sustainability, the Trust's operating model and its commitment to responsible stewardship.
- **Strategic Procurement Programme:** Oversee the Trust's programme of strategic procurement activity, ensuring significant contracts and expenditure categories are proactively reviewed, competitively procured and effectively managed.
- **Category Management:** Develop and embed a structured category management approach across major areas of expenditure, using spend analysis, benchmarking and market intelligence to identify opportunities for consolidation, standardisation, efficiency and improved service quality.

- **Value for Money:** Ensure procurement decisions deliver demonstrable whole-life value for money, appropriately balancing cost, quality, service, risk, sustainability and educational outcomes.
- **Procurement Compliance:** Ensure procurement activity complies with applicable legislation and regulatory requirements, the Academies Trust Handbook, Trust financial regulations, the Scheme of Financial Delegation and relevant public procurement requirements.
- **Commercial Governance:** Establish proportionate governance, controls and reporting arrangements for procurement activity, including business cases, tender evaluations, contract awards, waivers, declarations of interest and appropriate approval processes.
- **Contract Management:** Strengthen the Trust's approach to contract management, ensuring clear ownership, effective supplier performance management, timely contract reviews and proactive management of renewals, extensions and termination dates.
- **Supplier Relationship Management:** Oversee the development of strategic supplier relationships, ensuring key suppliers are held accountable for performance, service standards, value for money, innovation and continuous improvement.
- **Spend Analysis & Opportunity Identification:** Use Trust-wide expenditure data and analytics to identify savings opportunities, reduce unnecessary variation, challenge historic purchasing behaviours and support evidence-based commercial decision-making.
- **Procurement Pipeline:** Maintain strategic oversight of the Trust's procurement pipeline and contracts register, ensuring sufficient forward planning for significant procurements and avoiding unnecessary extensions, unmanaged expenditure or loss of commercial leverage.
- **Procure-to-Pay Integration:** Ensure procurement strategy, purchasing controls and P2P systems operate as an integrated end-to-end process, improving compliance, efficiency, transparency and management information.
- **Stakeholder Engagement:** Work collaboratively with Executive leaders, Principals, operational teams and budget holders to ensure procurement activity reflects operational requirements while supporting appropriate Trust-wide standardisation and strategic priorities.
- **Procurement Capability:** Build commercial and procurement capability across the Trust through guidance, training and practical support for budget holders and other stakeholders involved in purchasing, commissioning and contract management.

## Finance Championship & Governance Training

- **Finance Champion:** Act as the Trust's champion for financial literacy, ensuring leaders and governors understand the key drivers of financial performance and their respective responsibilities for effective stewardship.
- **Governor Training & Support:** Design, deliver and continually refresh a comprehensive finance training framework for local and regional governors to strengthen financial oversight and strategic scrutiny.
- **Reporting Accessibility:** Champion clear and accessible financial information, translating complex financial models and analysis into narrative-driven dashboards and reports for non-finance stakeholders.
- **Strategic Scrutiny Guidance:** Equip governing bodies to ask critical, high-impact questions concerning budget performance, financial risks, value for money, resource allocation and structural sustainability.
- **Financial Capability:** Develop guidance, resources and training that build the financial capability and confidence of Principals, budget holders and other leaders across the Trust.

## Tax Leadership & Compliance

- **Tax Strategy & Matters:** Lead on Trust-wide tax matters, ensuring compliance with relevant legislation covering VAT, corporate taxation where applicable to trading subsidiaries, employment tax and IR35 requirements.
- **VAT Optimisation:** Oversee the Trust's VAT accounting arrangements, including partial exemption methodologies, capital goods scheme considerations and opportunities to maximise legitimate VAT recovery.
- **Advisory & Governance:** Provide expert internal advice on the tax implications of major capital projects, corporate restructures, commercial contracts, procurement initiatives and other significant strategic decisions.
- **Tax Risk Management:** Identify and manage significant tax risks, ensuring appropriate professional advice is sought where required and that material matters are appropriately reported and governed.

## Financial Risk Management

- **Risk Management Framework:** Lead the design, deployment and ongoing development of the Trust-wide financial risk management framework, ensuring financial risks are systematically identified, assessed, managed and reported.
- **Financial Risk Register:** Maintain strategic oversight of the financial risk register, ensuring risks have clear ownership, appropriate mitigation actions and effective escalation arrangements.
- **Scenario & Sensitivity Analysis:** Use financial modelling and sensitivity analysis to quantify significant risks and inform contingency planning and executive decision-making.
- **Control Improvement:** Work with colleagues across finance and the wider Trust to identify control weaknesses and develop proportionate, sustainable solutions.

## Shared Services Mobilisation and Continuous Improvement

- **Operating Model Design:** Co-design, mobilise and continuously improve the end-to-end finance operating model for St Gabriel the Archangel CMAT, including roles, workflows, service levels, systems and controls.
- **Standardisation:** Implement standardised policies, procedures and toolkits across academies, ensuring consistency while remaining responsive to appropriate local context.
- **Service Evaluation:** Develop and monitor service KPIs and SLAs and lead regular performance reviews and continuous improvement activity.
- **Process Improvement:** Identify opportunities to simplify, standardise, automate or eliminate inefficient processes, releasing capacity for higher-value activity.
- **Cross-Functional Working:** Work collaboratively across finance, operations, education, HR and other functions to ensure systems and processes are integrated and organisational priorities are effectively supported.

## Leadership Behaviours

- **Values-led:** Demonstrates clear alignment with the Trust's Catholic mission, ethos and values, ensuring financial and commercial decisions reflect responsible stewardship and service to the Trust's academies and communities.
- **Strategic:** Thinks beyond immediate financial pressures, anticipating future challenges and opportunities and translating them into practical action.

- **Integrity:** Demonstrates the highest standards of integrity, professional judgement and accountability and acts as a role model for stewardship, compliance and ethical decision-making.
- **Collaborative:** Builds productive relationships across central and academy teams and works constructively across professional boundaries to achieve shared objectives.
- **People Developer:** Delivers through others, coaching, supporting, challenging and developing professional staff while holding individuals and teams appropriately accountable for performance.
- **Commercially Astute:** Understands markets, suppliers, contracts, value drivers and commercial risk and applies this insight to achieve sustainable value for money.
- **Insight-led:** Uses data, analysis and professional judgement to identify the issues that matter and communicates these clearly to support effective decision-making.
- **Continuous Improvement:** Maintains an improvement mindset, using technology, insight, innovation and organisational learning to deliver better outcomes for pupils and communities.

### Person Specification

| Criteria                                      | Essential                                                                                                                                                                                                                                                                                                                                                                              | Desirable                                                                                                                                                                                                                           |
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| <b>Qualifications</b>                         | CCAB, CIMA or equivalent fully recognised professional accountancy qualification.<br>Evidence of continuous professional development.                                                                                                                                                                                                                                                  | Certified project management credential, such as PRINCE2, Agile or PMP. Specialist tax qualification, such as CTA, or equivalent depth of practical tax experience. Relevant procurement or commercial qualification, such as CIPS. |
| <b>Leadership &amp; Management Experience</b> | Significant post-qualification experience in a senior FP&A, finance transformation, systems, projects or commercially focused finance environment.<br><br>Proven track record of directly line-managing, mentoring and performance-managing professional staff.<br><br>Ability to provide strategic direction while empowering specialists to deliver within their areas of expertise. | Experience leading multidisciplinary teams covering finance, procurement, systems or transformation.                                                                                                                                |

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| <b>Financial Planning &amp; Analysis</b>       | <p>Significant experience of budgeting, forecasting, scenario modelling and strategic financial analysis. Strong understanding of driver-based planning, balance sheet management, cash flow forecasting and narrative-driven reporting.</p>                                                       | <p>Experience using IMP or comparable budgeting and forecasting software.</p>                                                                     |
| <b>Procurement &amp; Commercial Experience</b> | <p>Experience of providing strategic oversight of procurement, commercial activity, major contracts or significant expenditure categories.</p> <p>Strong understanding of value for money, contract management, supplier performance and commercial governance.</p>                                | <p>Experience of public sector procurement and category management. Experience managing or overseeing a professional procurement function.</p>    |
| <b>Transformation &amp; Projects</b>           | <p>Proven track record of leading complex finance or organisational transformation projects, such as major FMS transitions, automated P2P implementation or process improvement programmes. Experience establishing robust project governance and managing delivery to time, cost and quality.</p> | <p>Experience establishing or transitioning to a Finance Shared Services model.</p>                                                               |
| <b>Process Improvement &amp; Technology</b>    | <p>Proven track record of leading process improvement initiatives that have measurably improved efficiency, control, reporting quality or month-end timelines.</p> <p>Strong understanding of systems implementation lifecycles, data migration and systems integration.</p>                       | <p>Experience identifying, assessing or deploying AI tools, advanced analytics or automated forecasting models within finance or procurement.</p> |

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| <b>Treasury</b>                       | Experience managing, modelling or executing corporate treasury and cash management strategies. Strong knowledge of cash management, treasury optimisation and investment risk.                                                                                                | Experience managing treasury within a large, complex or public sector organisation.                                                                                                       |
| <b>Tax</b>                            | Robust practical experience of complex corporate or public sector tax matters, particularly VAT.<br><br>Comprehensive working knowledge of VAT regulations relevant to charities, academies or public sector organisations.                                                   | Specialist tax qualification or experience of partial exemption, capital goods schemes, corporate structures or employment tax.                                                           |
| <b>Governance &amp; Communication</b> | Experience presenting complex financial information to non-finance boards, governors, trustees or senior leaders. Outstanding presentation, coaching and financial storytelling skills. Ability to translate technical matters into clear, accessible and actionable insight. | Experience designing and delivering governor or trustee finance training.                                                                                                                 |
| <b>Sector Knowledge</b>               | Strong understanding of governance, internal control, financial stewardship and regulatory compliance.                                                                                                                                                                        | Experience working within a Multi-Academy Trust or the wider public sector. Thorough understanding of DfE requirements, the Academies Trust Handbook and public procurement requirements. |

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| <b>Personal Attributes</b> | Fully supportive of the Catholic ethos, values and mission of St Gabriel the Archangel CMAT. Outstanding stakeholder management and influencing skills. High levels of professional integrity and judgement. Resilient and able to manage multiple complex priorities simultaneously. A collaborative leader who develops others and builds organisational trust. | — |
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