



Finance Business Partner- Job Description

Reports to	Chief Finance Officer (CFO)
Location	SWAN Trust Central office Woking (Main location) Travel to schools within Trust when required Hybrid working can be considered
Contract Type	Permanent 42 weeks per year, option of 52 week contract
Working Pattern	Monday to Friday – 36 hours per week
Salary	SWAN Pay Range 8-9 (depending on experience) £38,090 to £42,957 (FTE)

Note:

This Job Description is intended to provide guidance on the range of duties associated with this role. It may be changed by The SWAN Trust to reflect changes in working practices or to undertake additional duties as and when required. It does not form part of the post holder's contract of employment.

Purpose

Working alongside the central finance team the role will be focused on providing clear financial insight to schools within the Trust and to support school leaders in informed financial decision making and ensuring strong financial stability and value for money.

The Finance Business Partner will be tasked with keeping ahead of all funding and legislative changes that apply to the education sector, expenditure monitoring and assisting with internal and external audits.

Engagement and Support:

- Primary finance contact for schools within the Trust
- Partner with Headteacher to support planning and delivery of educational priorities
- Build strong relationships with schools to be a trusted financial advisor
- Work collaboratively with the central finance and HR teams

Operational:

- Ensuring accurate financial records are maintained
- Supervising and mentoring a team of Finance Assistants, including performance management
- To oversee the procurement process and ensure best practice and value for money
- Management of Revenue streams:

- Lettings income -including reviewing agreements, invoicing and ensuring maximum value.
- DfE grants - maintaining accurate records of spend related to specific grants including reporting to DfE
- Local Authority (LA) – working with SENCO and nursery leads in schools to ensure all funding received agrees with expected funding
- Overall – ensure all grants received are spent in accordance with all provisions.
- Weekly to monthly finance meetings with the Headteacher

Compliance & Governance:

- Ensure compliance with the Academies Account Direction, ESFA guidance and Trust policies
- Support the CFO in the preparation of financial information for the Audit both internal and external.
- Maintain strong internal controls and financial governance within the schools.

Financial Reporting & Analysis:

- Produce and present monthly management reports to the Headteachers and CFO
- Cost Centre reporting
- Provide insightful analysis of financial performance to support decision making and identify risks and opportunities
- Balance Sheet reconciliations
- Analysis of staff costs, ensuring that any differences between budget and forecast are understood
- Oversee school fund accounting i.e. trip income and expenditure
- Oversee monthly Bank Reconciliations
- Preparation of reserve reports for month and Year end
- Prepare and present financial reports and updates to governor committee meetings, providing clear analysis to support effective oversight.
- Support preparation of consolidated Trust financial reporting where required.

Financial Planning:

- Working with the central team and CFO to contribute to the overall Trust financial strategy
- Working with the Headteacher to prepare the annual 3-year budget plan and ensuring this aligns with school and Trust priorities
- Provide robust financial challenge to budget holders to ensure decisions are financially sustainable and deliver value for money
- Present the annual budget and forecast for individual schools to the CFO and CEO
- Monitor in year budgets and forecast, providing clear analysis and recommendations
- Support staff responsible for delegated budgets to enable them to monitor their budgets.
- Ensure effective use of resources within the schools
- Agree capital expenditure plan with Headteacher and monitor spend.

Other:

- Promote consistency, standardization and best practice across the trust
- Drive continuous improvement in systems, processes and reporting
- Prepare business cases for specific school projects

- To provide support and advice for fundraising activities including writing bids for funding as required by ESFA.
- Work on specific projects within the Trust as directed by the CFO.
- Performance management the Office Admin Staff and premises manager at two schools with the support of the Headteacher

Other Duties and Responsibilities:

Safeguarding

- Work in line with statutory safeguarding guidance (e.g. Keeping Children Safe in Education, PREVENT) and our safeguarding and child protection policies.
- Promote the safeguarding of all children.

Standards and Quality Assurance

- Support the aims and ethos of the school and The SWAN Trust.
- Set a good example in terms of dress, punctuality, and attendance.
- Attend team meetings when applicable.
- Develop expertise through staff development opportunities.
- Be proactive in matters relating to health and safety.

Person Specification

Experience & Qualifications:

Essential	Desirable
Full or part qualified accountant or relevant experience.	Experience working in the Education sector or Trust environment.
Knowledge and experience of financial and budget management and monitoring	Knowledge of ESFA regulations
Excellent Microsoft excel skills	Knowledge of education finance applications

Skills:

Essential	Desirable
Pro- active and self-motivated	
Strong communication skills across different areas of the business	
Strong organisational and analytical skills	
Excellent attention to detail	

Personal Qualities:

Essential	Desirable
Flexible and adaptable	
Ability to work under pressure	
Good sense of humour	
Empathetic to the environment you are working in	