



SOUTH WEST ESSEX
COMMUNITY EDUCATION TRUST

Job Description

Finance Business Partner





JOB TITLE: Finance Business Partner

REPORTS TO: Chief Operating Officer (COO)

GRADE / SCALE: Grade E

JOB PURPOSE

The job purpose of the Finance Business Partner is to be responsible and accountable for the financial management in Trust schools, using high level interpersonal and influencing skills to guide stakeholders to ensure appropriate outcomes.

To provide operational finance advice and support to Trust schools in accordance with legislation, policies, procedures and current best practice.

To develop and maintain high quality working relationships with senior leaders and line managers.

To mentor, guide, train non-finance staff in the Trust to ensure consistent, quality financial management in Trust schools.

KEY CORPORATE ACCOUNTABILITIES

- Commitment to the Trust and school's vision and values;
- To maintain awareness of and commitment to the Trust's Equality, Diversity and Inclusion in Employment Policy in relation to both, employment and service delivery and to observe of conduct which prevents discrimination taking place;
- To comply with all Trust policies and procedures including the Code of Conduct, Safeguarding Policy and E-Safety Policy;
- Undertake safeguarding training at least annually, with further updates as required;
- To fully comply with the Health and Safety at Work Act 1974, the Trust's Health and Safety Policy and all locally agreed safe methods of work;
- To work with colleagues to achieve service plan objectives and targets;
- To participate in the Performance Management Procedure and contribute to the identification of team development needs; and
- At the discretion of the COO, such other activities as may from time-to-time be agreed and are consistent with the nature of the job description herein.

PRINCIPAL ACCOUNTABILITIES

- Oversee, amend, develop and implement financial processes and maintain the finance management system and all ledgers for any location.
- Update Financial Regulations, ensure adherence to them and champion best practice.
- Work with the Chief Operating Officer and others in the team, in the preparation, general supervision and maintenance of school/Trust budgets to include funding, expenditure and staffing.
- Liaison with HR colleagues to ensure shared knowledge of the monthly staffing position enabling staffing related budget conversations with schools (with support of HR as appropriate).
- Create employee scenarios in budget planning software through liaison with Headteacher and Chief Operating Officer.
- Work with budget holders, including Headteachers to monitor whole or part budgets, to ensure agreed budgets are followed.



- Contribute to the preparation of the annual accounts and balance sheet and at times, the preparation of statutory and annual returns to the Education & Skills Funding Agency and Companies House.
- Oversee the maintenance of the Trust bank accounts, and all associated banking services including collecting money, banking, online merchant accounts and payment systems, weekly reconciliation and petty cash.
- Place orders as required and authorise orders as permitted. Ensure that orders are placed for budgeted items at the beginning of the financial year, charging accounts correctly and enter prepayments as necessary.
- Monitoring of contracts to ensure compliance, best value and timely renewal as appropriate.
- Enter the budget plan and fund allocations on the budget planning software and finance system. Maintain accounts, account transfers and virements between cost centre accounts after approval.
- Ensure all creditor accounts are well maintained and paid to agreed terms, and chase any unpaid debtor accounts included invoiced income and VAT.
- Administer the Trust's corporate card account and ensure all purchases realise value for money and are within the spirit of the card holder agreement.
- Maintain regular contact with all members of the school staff, external organisations and service providers. Develop positive relationships that support the work of the team and raise the profile of the Trust.
- Assist with the submission of applications for grants and appeals for capital funds to external organisations.
- Introduce new income generation activities and initiatives in line with the ethos of the school.
- With the Chief Operating Officer and local school staff to develop and implement a comprehensive income generation plan for the school. Work with the Chief Operating Officer and local schools' staff to enhance the community programme of the school, to improve participation rates and increase facility usage.
- Collaborate across the Trust in all finance and business matters as directed by the Chief Operating Officer within the remit of the Central Finance team.
- Fully participate and support internal control reviews and external audits as required. Provide support to other colleagues in schools and within the team at this time. Fully prepare, as requested, for audits for early year end procedures.
- Report any student and school issues in line with the Trust's policies for health and safety, child protection, behaviour management etc.
- Attend meetings and training sessions as required and be prepared to travel on occasions to relevant training,
- To actively seek feedback from 'customers' on service content and quality and use information to improve own practice and inform overall finance service delivery.

The duties and responsibilities in this job description are not restrictive and the post-holder may be required to undertake any other duties that may be required from time-to-time. Any such duties should not, however, substantially change the general character of the post.

This organisation is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment.

I confirm that I have read and understood, and that I accept, the above job description:

Signature: Date: Name in full:



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Finance Business Partner Person Specification

Criteria	Detail	Requirements
Qualifications & Experience	Specific qualifications and experience	Qualified accountant status (ACCA, CIMA, ACA or equivalent) Proven experience of Finance Manager role in education setting Effective project management experience
	Literacy	Excellent reading and writing skills – at least English GCSE (A-C) level or equivalent
	Numeracy	At least Maths GCSE (A-C) level or equivalent
	Technology	Strong ICT skills including MS Office suite and payroll Familiarity of PS Financials and other financial systems.
Knowledge		Excellent working knowledge of current academy finance best practice Excellent working knowledge of finance policies and procedures Working knowledge of general school policies and procedures
Communication	Written	Proven experience of completing detailed and complex reports, forms and letters to a high level of accuracy
	Verbal	Effective at exchanging verbal information clearly and sensitively
	Negotiating	Effective negotiation skills
Other	Teamwork	Proven experience of working in a team and contributing to a team's success Proven experience of working on own
	Relationships	Proven experience of establishing rapport and successful working relationships
	Information	Excellent analytical and problem-solving skills Proven ability to provide timely and accurate information
	Organisational skills	Excellent organisational skills Ability to work accurately with attention to detail
	Time Management	Proven ability to manage own time effectively with competing demands of the job role
	Creativity	Proven ability to come up with creative solutions to complex situations which comply with statutory or procedural requirements
	Child Protection	Good understanding of and commitment to child protection procedures
	Confidentiality/Data Protection	Good understanding of procedures and legislation relating to confidentiality
	CPD	Demonstrates a clear commitment to develop and learn in the role Proven ability to effectively evaluate own performance and share knowledge with others