

Post Name	Finance Business Partner
Reporting To	Head of Financial Planning & Analysis
Location	Hybrid working/flexible
Salary Scale Point	NJC point 35 to NJC point 39 (full time equivalent) £46,142- £50,269 To be appointed on a 5-point band within this range depending on experience
Weekly Hours	52 weeks 1 FTE / 37 hrs a week preferred but part time working may be considered
Contract Type	Permanent

Main Duties

Core Purpose:

To work collaboratively with the Director of Finance and Head of Financial Planning & Analysis to provide comprehensive strategic financial and budgetary support services across a cluster of schools. Provide high quality financial support and advice to ensure that the academies make the best possible use of resources and are able to provide the best outcomes for pupils. Contribute to the achievement of the educational vision for the academies within the MAT and to support school improvement accordingly.

Primary Duties & Responsibilities

- **Financial Planning and Analysis:**

Develop and monitor budgets, forecasts, and financial reports to ensure the trust's financial stability and sustainability. Provide financial expertise and insights to senior management and school leaders, enabling informed decision-making

- **Business Partnering:**

Meet regularly with Principals and school staff to understand their needs and provide tailored financial support. Work closely with other Trust central teams across Estates, HR and IT.

- **Performance Monitoring:**

Track and analyse financial performance, identify areas for improvement, and implement strategies to enhance efficiency and effectiveness.

- **Data Analysis and Reporting:**

Gather, analyse, and present financial data to support decision-making and strategic planning, by the effective use of benchmarking and integrated curriculum financial planning tools.

- **Budget Management:**

Preparation and management of school budgets, ensuring that resources are allocated effectively. Support the strategic recruitment plan within each academy ensuring that staffing decisions are factored into the relevant academy's budget.

- **Financial Management**

Work with the Central accounting team to ensure efficiency in terms of accounting entries that need to be performed at the school, including effective coding of Income & Expenditure, prepayments and accruals, control of petty cash and credit card expenditure. Complete Payroll reconciliations against Budget. Oversee and provide financial approval against budget for order processing and accounts payable in line with the trusts scheme of delegation.

- **Compliance & Governance:**

Ensure compliance with relevant financial regulations, policies, and procedures, and ensure the effective operation of financial systems and processes within the trust and its schools.

Supervision and Management

The role is graded to include line management, which may be added to your responsibilities as the Trust evolves with its centralised services.

Working Environment

Flexible Hybrid Working.

Other

Safeguarding Statement

Excalibur Academies Trust is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment. This post is subject to satisfactory references, which will be requested, prior to interview, an enhanced Disclosure and Barring Service (DBS) check, medical check, evidence of qualifications plus verification of the right to work in the UK.

Equality & Diversity

The Trust will endeavour to make any necessary reasonable adjustments to the job and the working environment to enable access to employment opportunities for disabled job applicants or continued employment for any employee who develops a disabling condition.

General Data Protection Regulations

The post holder is required to comply with GDPR regulations ((EU) 2016/679) (unless and until the GDPR is no longer directly applicable in the UK) and then (ii) any successor legislation to the GDPR or the Data Protection Act 1998, including the Data Protection Act 2018). The postholder is to maintain awareness of Trust policies and procedures in this area. Attention is specifically drawn to the need for confidentiality in handling personal data and the implications of unauthorised disclosure.

Health & Safety

The post holder must always carry out his/her responsibilities with due regard to Trust policy, organisation and arrangements for Health and Safety at Work.

Whilst every effort has been made to outline the key duties and responsibilities of the role, it is not an exhaustive list. The duties and responsibilities of the role may vary from time to time, commensurate with and without changing the general character of the duties or the level of responsibility entailed, and would not in itself justify a reconsideration of the grading of the post

	Essential	Desirable	How Identified
Education & Qualifications			Formal possession of an appropriate qualification to be verified at Interview or from records
Suitable financial business qualification or relevant experience in school business finance e.g. AAT, CSBM, DSBM, CIMA, ACCA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
A record of Continuing Professional Development activities	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Right to work in the UK.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Relevant Experience			Past employment activity record from Application Form or Interview. Performance in related selection methods, e.g. presentation, group discussion.
Working in a school/MAT/Education sector	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Experience as a member of a senior management team	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Knowledge and experience of financial management systems and academy funding	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Experience of leading and managing budgeting and reporting processes in an organisation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Experience of working with a range of internal and external partners including non-finance personnel	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Knowledge and experience of managing procurement, contracts for services, health and safety etc.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Understanding of the academy’s agenda and environment	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Skills & Abilities			
Strong organisational and planning skills	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Ability to ensure confidentiality is maintained at all times	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Ability to influence and participate in the academy management processes	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Ability to prioritise and manage conflicting demands	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Strong people management skills, with highly developed interpersonal and motivational skills	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Highly competent IT skills including Excel, MS Office and word processing.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Disposition			
Commitment to equality of opportunity and the safeguarding and welfare of all pupils	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Willingness to undertake training	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Application form and interview questioning and reference.
General & Specific or Legal knowledge			
Ability and/or willingness to travel as required.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	