



Job Description

POST: Finance Business Partner **RESPONSIBLE TO:** Finance Director

SALARY: Scale K, point 28 - 31 £39,152 to £41,771 per annum (pay award pending)

LOCATION: CAT Central (regular visits to Trust schools)

WORKING PATTERN: Full time - 37 hrs. per week (52 weeks, whole year)

DISCLOSURE LEVEL: Enhanced

Key Relationships:

- Finance Director
- Business Support Manager
- Trust Executive Group including CEO & CFO
- Head Teachers and School SLT
- Community Academies Trust - Business support staff
- Community Academies Trust - Central finance staff
- School finance teams & school office staff

Responsible for:

Reporting to the Finance Director, this position is a key member of the central Finance and Business Partnering function of the Trust. The role supports the CFO, Trust Executive Group and schools with their financial management and provides advice on financial planning, budgeting, reporting, analysis, payroll reconciliation, value for money and investment management. The role will require the postholder to move beyond transactional reporting, using data analysis and forecasting to provide insight, challenge assumptions and support sustainable financial planning.

The Finance Business Partner ensures the Trust's financial scheme of delegation, policies and procedures are complied with consistently and aligned to DfE and UK Generally Accepted Accounting Practice. In addition, the postholder assists in the welcoming of new schools into the Trust, inducting them into the trust's financial processes and helping to set budgets and produce financial models.

The role requires strong data analysis and forecasting skills to interpret financial and operational information, identify trends and risks, and support evidence-based decision making across schools and the Trust.

To achieve the above, the post holder needs to be willing and able to travel to a number of schools across the Midlands area. The post holder contributes to the provision of financial management information to the CFO and Trust Executive Group and the preparation of accounts for audit. The post holder may also be involved in procurement projects to obtain best value for the Trust and its schools and is involved in designing and rolling out new and improved financial systems.

Responsibility for staff: The post has indirect management responsibility for finance, office and administration staff in schools for their finance activity. Direct line management is the responsibility of the Headteacher.

Responsibility for budget: Accountability for individual school budgets rests with the Headteachers. However, this position has significant influence in supporting them to make difficult budgeting decisions which impact on individual schools and our Trust and then holding them to account for achieving the budget.

Responsibility for physical resources: The post has some responsibility for personal physical resources such as IT.

Main Purpose:

The main duties and responsibilities are as indicated below. Other duties of an appropriate level and nature may also be required, as directed by the Finance Director. Please note that the post holder may be required to work outside of normal working hours for activities, meetings and emergencies.

The post holder is required to support and encourage the trust's ethos and its objectives, policies and procedures as agreed by the Board of Directors, including child protection matters.

General:

- As part of the central team who deliver guidance, training and development of Headteachers and school office staff, including those new to the Trust or new to working in schools.
- Be an advocate for cross-trust working and utilising resources and expertise as a single organization.
- Liaise frequently with the Trust central finance team to assist with their work in maintaining the finance system including purchase and sales ledger and balancing of control accounts.
- On occasion, deputise for the Finance Director or Business Support Manager.
- Put consistency, probity, and value for money at the heart of everything we do, working with all the schools in our Trust. Be always alert to the best interests of our Trust.
- Any other duties that are reasonable and commensurate with this level of responsibility.

Financial Support to Schools:

- Collaboration with school office staff and headteachers to prepare robust annual and 5-year budgets for Headteachers and the Trust Executive Group.
- Prepare monthly management accounts, forecasts, data and variance analysis, using financial and operational data to identify trends, risks and opportunities and emerging pressures.
- Continuous updating of the 5-year budgets where appropriate.
- Develop and model alternative financial scenarios, including staffing, pupil number, funding and cost assumptions, to support Headteachers and senior leaders in making informed budget decisions.
- Use forecasting tools and budget planning software to test assumptions, assess affordability and provide clear recommendations on the financial impact of different options.
- Assist and support the production of monthly written reports for the Trust Executive Group, headteachers, governors and trustees on the school's financial performance.

- Produce costings for alternative scenarios and advise headteachers on the options available. Make recommendations in line with experience.
- Collate budget monitoring and planning information for the Central team. Inform the Finance Director of any serious concerns about the current or future year budgets.
- Contribute to Trust wide financial reports for the Trust Executive Group including the CFO.
- Advise on developing and monitoring additional school budgets such as care club provision, catering or leasing/letting sections of the school property.
- On occasion, attend governing body meetings and support the headteachers to present complex financial information to community stakeholders.
- Support the school office staff in making insurance claims.
- Monthly payroll reconciliation tasks.
- Support the maintenance of budget planning software in respect of salary projections.
- Ensure the security and confidentiality of highly sensitive financial data.
- Maintain effective relationships across the trust including attending school and trust business and finance manager's meetings where required.
- Share best practice with other schools in the trust.
- Prepare and deliver training sessions in own area of expertise as best practice develops in person or online.
- Attend trust wide events.
- Ensure the correct VAT treatment for school income is compliant and implemented accurately and consistently.

Support to Trust:

- Support school office staff in the operation of the Trust Finance systems
- Support school office staff and headteachers in the operation and application of Trust financial procedures and policies
- Collaborate with colleagues in the central team to review and revise financial policy, procedures and processes
- Collaborate with central team colleagues to implement new software, procedures and processes across the Trust.
- As a member of the central team, produce accounting reports and summaries for the internal and external audits.
- Support the completion of monthly and annual close down processes as determined by the Trust.
- Assist school finance office staff, headteachers and members of the central team in the assessment and recording of Service Level Agreements and contracts.
- Carry out limited scope procurement exercises on behalf of the Trust and contribute to larger scope procurements.
- Provide advice and guidance to school staff on all financial behaviours in accordance with CAT Policies, HMRC guidance, Academies Financial Handbook and any other appropriate guidance.
- Report any concerns about financial probity to the Finance Director
- Contribute to the development of policies concerning financial probity.

- Maintain an up-to date understanding of relevant educational issues, policies and legislation; and incorporate the implications into the operation of your role.

New Schools:

- Support the CFO, Finance Director, Business Support Manager and other colleagues in carrying out financial due diligence on schools and academies joining our Trust
- Develop staffing and financial budgets for joining schools.
- Work through checklists and notifications to ensure all matters are dealt with when a new school joins the Trust, particularly concerning setting up of payroll and pension schemes.
- Welcome new staff who join our Trust and support them in the operation of the Trust's finance system and all financial processes and procedures.

Safeguarding Children:

- Our Trust is committed to safeguarding and promoting the welfare of children and young people. We expect all staff to share this commitment and to undergo appropriate checks, including enhanced DBS checks.
- The above responsibilities are subject to the general duties and responsibilities contained in the Statement of Conditions of Employment. The duties of this post may vary from time to time without changing the general character of the post or level of responsibility entailed.
- The person undertaking this role is expected to work within the policies, ethos and aims of the Trust and to carry out such other duties as may reasonably be assigned by the Line Manager.
- The post holder will be expected to have an agreed flexible working pattern to ensure that all relevant functions are fulfilled through direct dialogue with employees, contractors and community members.

English Duty:

- This role is covered under part 7 of the Immigration Act 2016 and therefore the ability to speak fluent spoken English is an essential requirement for this role.

Person Specification

Our Values and Vision

These are our values. They can be thought of as our ‘non-negotiables’ - beliefs, expectations and standards that underpin how we work with the young people in our care, and the community we serve. We believe that if we work in the context of these values, students will achieve more than they ever thought possible. They are also values that have evolved following a sustained period of success for our school.

Our Young People

We value three main types of achievement for our young people, and the vision for our school is that we ensure our students are empowered to achieve to a consistently outstanding level.

Achievement - Academic: We believe all young people have the potential to achieve great things. Intelligence can be developed regardless of emotional and social background, given appropriate teaching and bespoke, individualised support.

Young people should be encouraged to develop autonomy and meta-cognitive control (‘knowing what to do when they don’t know what to do’) in their learning and to gain inspiration from learning. They should be equipped with a crucial sense of possibility based on a well-developed self-awareness and ambition - ambition not only for themselves but for the communities in which they live and work.

Achievement - ‘letting your light shine’: All young people achieve things they can be proud of every day in addition to academic success and outside our school’s planned curriculum. We have a vital role in ensuring individuals develop their own talents and interests and have a responsibility to instil in them a sense of pride in who they are and what they achieve. We must recognise and celebrate these achievements.

Achievement - relationships (Starfish Principle): Excellent relationships for learning are a prerequisite for all other achievements. Relationships that result in mutual respect between young people and all other members of our school community will ensure learning can be fun in a disciplined and caring environment where the highest expectations are the norm.

Our Staff

Our Values extend to how we challenge, support and work with each other. All staff (support and teaching) play a crucial role in the education of young people. We all understand how our work has a direct influence on the life chances of the young people in our care. In the same way that we all have a duty of care to them, we have a duty of care to each other and have regard for each other’s professional and personal wellbeing.

The Trust Board sees all members of the Trust’s staff community as learners. They are empowered to make decisions, be creative and to lead. Mutual respect pervades all relationships working together to enhance professional learning and practice and collaboration; collegiality and a sense of team identify how all staff work together. Staff co-operate with each other and are not in competition with each other - they are part of a team that ensures the academies throughout the Trust strengthen their positions among the best academies in the country.

	Essential	Desirable
Qualifications	<p>CCAB part qualified and/or AAT L4 qualified</p> <p>5 GCSEs (or equivalent) including English and math at grade A-C or equivalent.</p>	<p>CIPFA qualification in Financial Reporting for Academies</p> <p>CCAB Qualified or willing to work towards qualification or equivalent.</p>
Experience, Skills and knowledge	<p>Experience working in an office environment.</p> <p>Use of ICT, financial software packages and other specialist equipment.</p> <p>Be ICT literate and able to use the internet, operate Microsoft using complex formulas or similar office packages, produce analyses, use email etc.</p> <p>Strong data analysis skills, with the ability to interpret complex financial and operational data, identify trends and variances, and present clear conclusions to non-finance colleagues.</p> <p>Experience of preparing forecasts and scenario models to support budget planning, staffing decisions and longer-term financial sustainability.</p> <p>Knowledge of relevant policies/codes of practice and awareness of relevant legislation.</p> <p>Work constructively as part of a team, understanding school roles and responsibilities and your own position within these.</p> <p>Organise, positively influence, lead and motivate other staff.</p> <p>Plan and develop systems.</p> <p>Relate well to children and to adults.</p> <p>Methodical with attention to detail.</p> <p>Communication skills with the ability to exchange information in a clear and concise written format as well as orally.</p> <p>Organisation and prioritising skills with ability to work to deadlines.</p>	<p>Previously experienced as a Finance Business Partner, Management Accountant or similar role.</p> <p>Experience of using Power Query, Power BI or similar reporting tools to automate reporting, analyse trends and present financial information clearly.</p> <p>Project management.</p> <p>Experienced in procurement to achieve best value.</p> <p>Experience of education or not for profit sector.</p>

	<p>Analytical and problem-solving skills.</p> <p>Attention to detail with accuracy and precision.</p>	
<p>Personal Qualities</p>	<p>Friendly yet professional and respectful approach which demonstrates support and shows mutual respect.</p> <p>Eye for detail and accuracy.</p> <p>Able to explain numerical and financial concepts which others may find difficult.</p> <p>Always maintains confidentiality and recognises privileged position with access to staffing and financial information.</p> <p>Open, honest and active listener.</p> <p>Take responsibility and accountability.</p> <p>Committed to the needs of stakeholders and challenge barriers and blocks to providing an effective service.</p> <p>Demonstrates a “can do” attitude including suggesting solutions, participating, trusting and encouraging others and achieving expectations.</p> <p>Use own initiative, solve problems and prioritise workload in a busy environment, working to deadlines.</p> <p>Committed to the provision and improvement of quality service provision.</p> <p>Adaptable to change/embraces and welcomes change.</p> <p>Acts with pace and urgency, enthusiastic and decisive.</p> <p>Committed to the continuous development of self and others by keeping up to date and sharing knowledge, encouraging new ideas, seeking new opportunities.</p>	

	<p>Commitment to own development with a willingness to attend training sessions, meetings and keep up to date with all professional developments.</p>	
Other	<p>Commitment to safeguarding and promoting the welfare of children and young people.</p> <p>Willingness to undergo appropriate checks, including enhanced DBS Checks.</p> <p>Full driving license and access to vehicles and willingness to regularly visit other schools within the Trust.</p> <p>Ability to form and maintain appropriate relationships and personal boundaries with children and young people.</p>	