



## JOB DESCRIPTION

Job Title:

**Finance Partner**

Location:

**Loughborough,  
with occasional UK-wide travel**

### **Job Purpose:**

As a Finance Partner in the Trust's central finance team, you will support non-finance colleagues by providing financial insight, strategic guidance, and support to leaders and decision-makers across the organisation. You will challenge to ensure that spend/investment is aligned to organisational objectives, and will look to drive value for money, and support our goal of long-term financial sustainability for the Trust. You will drive best practice around the management of our people costs and work on a range of ad hoc projects to support the finance team, as well as the wider organisation.

This role will focus on supporting the Estates & Facilities, and IT teams. You will be responsible for supporting the preparation of financial forecasts for these areas, including capital costs, understanding and communicating cost drivers and reasons for variances to forecasts, assessing value for money, proposing recommendations to improve value for money, and supporting the preparation of financial aspects of business cases to inform expenditure and/or operational decisions. This role requires you to be comfortable working with stakeholders across the organisation, building trusted relationships and communicating financial matters clearly and effectively.

This role also partners our sports and music enrichment programmes.

We are committed to people development, so this role will provide opportunities for the successful candidate to continue their professional development. This role is vital in supporting the Trust's objectives by ensuring value for money, effective financial control, and accuracy of reporting.

### **Background:**

The David Ross Education Trust is a network of unique and diverse academies, committed to becoming one of the top-performing multi-academy trusts. The Trust's network comprises 36 primary and

secondary schools across the country, with a combined annual income and expenditure of over £100m.

**Reporting To:** Head of Finance

**Salary:** Depending on experience

# KEY RESPONSIBILITIES AND ACCOUNTABILITIES

## Key responsibilities will be:

### Finance Partnering

- ★ Finance partner role within the Trust's central finance team. The central finance team provides finance support across the whole Trust, and supports a broad range of stakeholders. Stakeholders include members of the Executive team, Principals, School SLTs, and senior central team members.

### Strategic Financial Management

- ★ Partner with your assigned budget holders and their teams to develop and implement financial strategies aligned with the Trust's goals and objectives.
- ★ Prepare financial business cases for any investments or other operating changes, provide recommendations that consider both financial and non-financial factors.
- ★ Provide financial analysis, insight, and challenge to support decision-making and drive financial performance, combining finance data with non-finance data where relevant, for example underlying cost-driver data, or income lead indicator data, to provide insight into financial efficiency and forecasts
- ★ Drive the development of long-term financial plans, forecasting, and scenario planning.

### Budgeting and Forecasting:

- ★ Lead the annual budget and forecast update process for your assigned areas of responsibility, working with senior leaders to produce accurate budgets, and ensuring alignment with Trust-wide financial objectives, including value for money and maximisation of income.
- ★ Lead on the preparation of the budget pack for the area, working with the FP&A manager to ensure consistency, and co-ordinating with senior leaders to ensure shared understanding.
- ★ Lead the forecast update process for your assigned areas, ensuring variances to budget are challenged and explained.
- ★ Work with stakeholders to identify different routes to achieving budget tasking and challenge.
- ★ Monitor and report on budget variances, providing analysis and recommendations for corrective actions, supporting budget holders to deliver their financial targets.

### Cost Control

- ★ Review, understand and challenge monthly management accounts ensuring variances to forecast/Budget and unexpected trends are clearly explained.
- ★ Support stakeholders to make staffing decisions which will help them deliver to their budget/forecast, providing clarity on if new roles/replacements are affordable within the current forecast.
- ★ Work with key stakeholders to ensure a shared understanding of the financial performance, working collaboratively to identify and resolve variances to the plan.
- ★ Support senior leaders with decision making, advising on budget implications and providing challenge as appropriate.
- ★ Support stakeholders to ensure income streams are maximised.

### **Stakeholder Management:**

- ★ Build and maintain strong relationships with key stakeholders, providing financial advice and support.
- ★ Act as the primary point of contact for financial matters within your portfolio of stakeholders.
- ★ Communicate complex financial information in a clear and understandable manner to non-financial stakeholders.

### **Leadership**

- ★ Be the voice of finance in key meetings and decisions, for the teams you partner. Provide appropriate challenge whilst recognising the bigger picture.
- ★ Be seen as a leader within the finance function; foster a positive work environment and provide clear direction and support to team members, encouraging a flexible approach to new challenges and opportunities.

### **Contract Management Support**

- ★ Challenge the contract managers in your area to ensure that suppliers are held to account for delivering value for money from the contract.
- ★ Working alongside procurement and the business stakeholders, provide independent challenge and perspective to the tender for significant contracts in the assigned area.

### **OTHER**

- ★ Undertake a range of projects to support both personal development and that of the team.

# PERSON SPECIFICATION

Your application will be reviewed against the essential and desirable criteria listed below.

Applicants are strongly advised to explicitly state and evidence how they meet each of the essential (and desirable) criteria in their application. Stages of assessment are as follows:

- 1 - Application
- 2 - Test/Presentation
- 3 - Interview

|   | Essential | Desirable | Assessed |
|---|-----------|-----------|----------|
| <b>Qualifications and Professional Development</b>  |           |           |          |
| ★ Qualified accountant – CIMA/ACCA/ACA  | ✓         |           | 1        |
| <b>Experience</b>   |           |           |          |
| ★ Knowledge of accounting principles, standards and procedures.   | ✓         |           | 1,2,3    |
| ★ Experience as Finance Partner 4+ years  | ✓         |           |          |
| ★ Experience of assessing processes and controls and consideration of risks.  |           | ✓         | 1,3      |
| ★ Experience of supporting commercial financial decisions.  | ✓         |           | 1,3      |
| ★ Experience of month-end/year end close process.   | ✓         |           | 1,3      |
| ★ Experience of presenting financial information in a clear and easy to understand format   | ✓         |           | 1,2,3    |
| ★ Experience of driving process improvement.  |           | ✓         | 1,3      |
| ★ Experience of dealing with a range of cross functional stakeholders.  | ★         |           | 1,3      |
| <b>Skills and Knowledge</b>   |           |           |          |
| ★ Excellent excel skills - (Lookups, Pivot tables etc.)   | ✓         |           | 1,3      |
| ★ Highly numerate with strong attention to detail   | ✓         |           | 1,2,3    |
| ★ Confident in using a range of finance systems.  |           | ✓         | 1,3      |
| ★ Excellent communication skills, with ability to influence non-finance stakeholders to have a beneficial impact on organisational performance. | ✓         |           | 1,2,3    |

|   |   |  |       |
|---|---|--|-------|
| ★ Excellent critical thinking skills, with an ability to identify and resolve issues.   | ✓ |  | 1,3   |
| ★ Able to work to deadlines and manage multiple priorities  | ✓ |  | 1,3   |
| Personal Attributes   |   |  |       |
| ★ Commitment to the values and vision of the Trust  | ✓ |  | 1,3   |
| ★ A proactive and solution-oriented mindset with a commitment to continuous improvement   | ✓ |  | 1,3   |
| ★ High level of integrity and professionalism   | ✓ |  | 1,3   |
| ★ Team player, who can engage others to deliver great results   | ✓ |  | 1,2,3 |
| Equal Opportunities   |   |  |       |
| ★ A commitment to promoting equality and diversity, providing an inclusive and cooperative environment in which all students and individuals working for and on behalf of the organisation feel respected and able to give their best | ✓ |  | 1,3   |
| Safeguarding  |   |  |       |
| ★ Committed to promoting the welfare of all children and creating a safe environment in which children can learn; considering, at all times, what is in the best interests of the child   | ✓ |  | 3     |
| ★ Play an important part in the wider safeguarding of children - identifying concerns, sharing information and taking prompt action to safeguard and protect them   | ✓ |  | 3     |
| ★ Aware that the Trust will take all steps to prevent those who pose a risk of harm from working with children. Recruitment procedures ensure rigour in identifying and rejecting people who might abuse children                     | ✓ |  | 3     |
| Health and Safety   |   |  |       |
| ★ Aware of Health & Safety and Safeguarding as appropriate to role  | ✓ |  | 3     |

*Whilst every effort has been made to explain the main duties and responsibilities of the post, each individual task undertaken may not be identified.*

*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 Academy 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.*

*This Job Description is current at the time of printing but will be reviewed on an annual basis and, following consultation with you, may be changed to reflect or anticipate changes in the job requirements which are commensurate with the job title and grade.*

*The David Ross Education Trust is committed to safeguarding and promoting the welfare of children and applicants must be willing to undergo vetting appropriate to the post, including a social media presence check and Enhanced DBS check. The successful applicant will be expected to adhere to all safeguarding, welfare and health and safety policies and procedures of the Trust.*

***All pre-employment checks are in line with "Keeping Children Safe in Education" statutory guidance.***