

Finance Business Partner

Job Description and Person
Specification



St Clare
Catholic Multi Academy Trust

Job Description – Finance Business Partner

Job Title: Finance Business Partner

Reporting to: Head of Finance

Direct Reports: None

Contract: Full time, all year round

Location: Trust-wide

Purpose of the role

To provide an effective and efficient financial support service to St Clare CMAT and its schools.

To support the delivery of timely, accurate and meaningful financial management information to a variety of internal and external user groups.

To provide advice and support to finance and non-finance colleagues and stakeholders on a proactive basis identifying areas for improvement and applying best practise.

Build partnerships and maintain strong relationships with all key stakeholders both internal and external.

Key Responsibilities

Primary role is to support the Head of Finance and CFO in delivery of efficient and effective finance function with particular responsibility for the following areas:

- Oversight of reconciliations and controls
- Responsibility for onboarding of new academies and schools into the Trust.
- Capital accounting lead
- VAT accounting and reporting
- Financial education and training across the Trust including monitoring use and activities
- Support the monthly and annual financial reporting cycle
- Champion financial policies, procedures and processes across the Trust
- liaison with school colleagues in order to effectively deliver duties of the role
- Adherence to the Trust's Scheme of Financial Delegation.
- Adherence to standard accounting policies and procedures.
- Managing and supporting the day-to-day operations of the Finance team

Preparation of timely information to support the monthly management account process within agreed deadlines

To monitor and supervise the reconciliation of key control accounts as part of the monthly management accounts preparation

Process journal adjustments, including:

- Intercompany

- Accruals
- Prepayments
- Deferrals

Manage credit control and bad debt provision

Assist budget holders with ad hoc requests for information and contribute to the monitoring of the budgets.

Assist Head of Finance with VAT return coding queries and keep checklist up to date. Act as key contact for VAT matters

Capital accounting including maintenance of the Fixed Asset Register

To support the Head of Finance monitor and control cash flow through the management of funds within the definitions of the Treasury Management Policy.

Provide technical accounting/finance and procedural advice and guidance.

To support the delivery of monthly financial management reviews across the Trust and supporting academy/school Headteachers and SBM interpret their financial management reports/data.

Lead contact for all day to day and operational enquires in relation to the internal and external audit programmes.

Direct support in the preparation of financial reports and submission of associated ESFA returns.

Direct support in the preparation of the Trust's annual financial statements, VFM statement and annual return.

To ensure contentious, complex and/or high value transactions are identified and referred for approval.

Manage the cyclical reporting for Trust's related trading entities, e.g. facilities hire companies and dormant company submissions.

Provide direct financial management support on project related activities across the Trust.

Operational Planning

To manage own workload to ensure the timely, accurate and consistent provision of management reports.

To co-ordinate with departmental colleagues to ensure sufficient time and resources are scheduled to support key internal and external reporting/submission deadlines.

Support the operational effectiveness of the department and provide cover where appropriate.

Deputise for the Head of Finance as and when required to provide flexible service delivery.

Assist in the development and maintenance of the department's annual deliverables schedule.

Service Development

Work with colleagues to deliver agreed finance procedures and processes as well as developing a programme of financial awareness and literacy amongst those with financial and decision-making responsibilities.

To undertake system and process reviews to identified operational efficiencies and easier opportunities for engagement with non-finance colleagues.

Stimulate best practice and alignment of financial reporting within St Clare.

Provide a customer focused service, ensuring that effective and constructive working relations are developed and maintained.

Staffing and Staffing Development

To identify training needs within the finance and wider non-curriculum staffing structure and provide appropriate guidance and training or make other suitable recommendations for action.

To assist in the delivery of high quality and value adding performance management reviews, taking corrective and positive action promptly, when required.

Support the delivery of training to the Finance Officer(s) and Finance Assistants to support their day-to-day activities.

To support the recruitment process so far as in that it relates to the recruitment of finance colleagues and/or those individuals who will have a financial responsibility/obligation to discharge.

Quality Assurance

To comply with and support the work of the internal and external audit teams.

To maintain the monthly and year end closedown process ensuring the timely delivery of monthly management accounts.

To identify and highlight any breach of St Clare's policies and procedures and financial regulations.

Attend all functions and meetings as directed by the CFO to support the delivery of the role and promote the values of St Clare.

Person Specification

	Essential	Desirable	Source
Education and Qualifications			
Accountancy Qualification e.g. ACCA, ACAEW, CIPFA	✓		A
Good general level of education with GCSE or equivalent in English and Mathematics – literate and numerate	✓		A
Willingness and ability to undertake further training, development and qualifications	✓		A I
Experience			
Leadership and management experience		✓	A I R
Experience of financial management and reporting within multi-site working environment	✓		A I
Experience of preparing complex period and year-end financial management reports	✓		A I
Annual budgeting and forecasting experience	✓		A I
Working knowledge of education and/or public sector		✓	A I
Finance systems experience and knowledge		✓	A I
Experience of working within FRS102 accounting standard		✓	A I
Relevant grant and/or fund accounting experience		✓	A I
Experience of project management and finance systems implementation		✓	A I
Skills, Abilities & Competencies			
Excellent organisational & prioritisation skills able to handle multiple tasks to a high standard and deliver work	✓		A I R
Excellent time management skills and ability to remain calm and focussed under pressure	✓		A I
Ability to work in an organised and methodical manner	✓		A I R
Ability to maintain accurate records and controls	✓		A I R
Ability to be flexible and respond effectively to the 'unexpected'	✓		A I
Excellent interpersonal skills with ability to communicate with a range of audiences internally and externally	✓		A I R
Develop and maintain good relationships	✓		A I R
Knowledge & Understanding			
Knowledge of education and/or public sector		✓	A I
An understanding of good financial controls, processes and procedures	✓		A I
Up-to-date knowledge of relevant legislation and guidance in relation to safeguarding within an education setting	✓		A I
Personal Qualities			
Enthusiasm and personal drive	✓		A I R
Initiative; common sense and a positive approach	✓		A I R
Management and organisational skills	✓		A I R

	Ability to work in collaboration with others and improve the work of the team	✓		A I R
	Demonstrate a professional attitude at all times	✓		A I R
	Committed to respecting, upholding and contributing to the Trust's distinctive ethos as a Catholic Trust	✓		A I R
	High standards of professionalism and confidentiality. Values the dignity of every person and is committed to treating everyone with respect.	✓		A I R

A = Application, I = Interview, R = References



St Clare Catholic Multi Academy Trust

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