



### Job Description

**JOB TITLE** Finance Business Partner

**PHASE** Central

**REPORTING TO** Head of Finance

### Job Purpose

Supporting the strategic development of each designated academy by working closely with the Leadership Team to enable effective decision making and achievement of academy aims.

Providing high quality strategic financial planning to ensure that the Academy/Trust makes best possible use of resources and is able to provide the best outcomes for pupils.

Maintain and monitor the efficient management of the designated academies' budgets. Maximising income generation and supporting development of grant applications.

### Duties and Responsibilities

#### Financial Management:

- Work with Senior Leaders to develop a strategic plan for the staff and resources of each designated academy.
- Prepare a five-year financial plan for each of the designated academies and as part of this exercise to prepare the annual budgets which support the financial plan.
- Monitor and maintain up to date budget and forecast figures for each designated academy using the Trust's budgeting software, IMP.
- Meet regularly with the school leadership to discuss monthly management accounts reports.
- Meet with budget holders as necessary to discuss budget spend.
- In conjunction with other leaders support the planning and implementation of capital purchase programmes.
- Liaise with funding agencies to identify and source additional funding and identify potential funding opportunities, agencies or government initiatives to ensure income generation from both diverse and obvious sources.
- Prepare financial reports, estimates and completion of financial returns as required
- Ensure the effective operation of financial controls within the designated academies and ensure they receive value for money for all expenditure.



- Meet regularly with key staff in the Central Finance Team to ensure consistency of approach in budgeting and forecasting across all academies.
- Work with key finance staff and the Trust auditors to support the audit requirements for each Academy, ensuring that information is timely and accurate.
- Work with the Head of Finance to oversee and develop financial procedures within the Trust that are in line with the agreed financial practices
- Ensure all staffing requirements are accurately reflected in budgets and forecasts (including monthly reconciliations of payroll prior to payment), providing challenge and support where necessary to ensure best possible outcomes for the Academy.
- Ensure accuracy of management accounts, and that fund types are correctly accounted for.
- To attend the regional Finance and Staffing Committee meetings to report on the current financial position of the designated academies and ensure they are all given the necessary information, both at the meeting and in advance, to discharge their duties effectively.
- Approve Purchase Orders and invoices, ensuring budget holders stay within allocation and meeting with budget holders as necessary to discuss budget spend.
- Authorise paylists, where appropriate authorisation has been received for payment from the delegated authority within each Academy.
- Be an active participant in 'Drive Team' meetings, representing Thinking Financial to ensuring a solution focused, cohesive working relationship is maintained with other Central Services and designated academies.
- Embrace TSATs customer values of being Trusted, Solution Focused, Approachable and Timely to deliver a first class service to all stakeholders.
- Play an active role in ensuring department KPIs are met on a monthly basis and work with the finance team to continuously improve the service we deliver to all stakeholders/customers.

#### **HR & Payroll**

- Support the strategic recruitment plan within each Academy ensuring that staffing decisions are factored into the relevant Academy's budget.
- Assist the Senior Team in the development of a staffing structure that meets financial considerations
- Maintain effective communication with the Office Manager in each Academy to ensure a co-ordinated approach on HR and payroll matters. Liaise with the Trust's in-house payroll and HR team as necessary.
- Ensure all relevant parties are aware of changes to staffing so that relevant paperwork can be checked/updated as necessary



#### Other

- Be aware of, and comply with, policies and procedures relating to safeguarding, child protection, health and safety, confidentiality and data protection, recording/reporting all concerns to the appropriate person and disclosures to the relevant professional.
- Be aware of and support difference and ensure all pupils have equal access to opportunities to learn and develop;
- Contribute to the overall vision and values of the Thinking Schools Academy Trust;
- Attend and participate in meetings, training and learning activities as required;
- Other duties agreed from time to time by the postholder with the Head of Finance.

#### Generic Duties relevant to all members of Staff

##### Working with colleagues and other relevant professionals

- Communicate effectively with other staff members, customer and service users.
- Collaborate and work with colleagues and other relevant professionals within and beyond the Trust.
- Develop effective professional relationships with colleagues.

##### Professional development

- Help keep their own knowledge and understanding relevant and up-to-date by reflecting on their own practice, liaising with their line manager and identifying relevant professional development to improve personal effectiveness.
- Take opportunities to build the appropriate skills, qualifications, and/or experience needed for the role, with support from the Trust.
- Take part in the Trusts appraisal and professional growth management procedures.

##### Personal and professional conduct

- Uphold public trust in the education profession and maintain high standards of ethics and behaviour, within and outside school.
- Have proper and professional regard for the ethos, policies and practices of the Trust, and maintain high standards of attendance and punctuality.
- Demonstrate positive attitudes, values and behaviours to develop and sustain effective relationships with the Trust community.
- Respect individual differences and cultural diversity.

##### The Trust

- The ethos of our Trust is “Transforming Life Chances”. All staff are expected to be committed to this aim in everything they do.
- It is expected that all staff work collaboratively as members of the Trust to share good practice, resources and ideas and realise the Trust’s visions and aims. All staff should act with professional integrity at all times, following the “Code of Conduct”.
- You will be asked to work across site within the Trust and you should expect to travel between sites as required.



### Teaching and Learning

- This is our core business and therefore it is an absolute priority. You are expected to support all teaching staff, irrespective of seniority, to ensure they concentrate on the core business. This may mean undertaking tasks outside of your area of responsibility where required.

### Customer Service

- At TSAT customer service is paramount to our way of work; All staff will be required to mirror our philosophy and take pride in offering a fantastic customer experience to all stakeholders modelled on our four Customer First Values - Trusted, Solution Focused, Approachable & Timely

### ICT

- It is expected that all teaching and support staff follow the ICT Vision of the Trust.
- All staff will be expected to utilise ICT and to improve communication and reduce paper use. Security procedures must be followed when using ICT systems.
- All staff are expected to follow the procedures as laid out in the Trust's Acceptable Use Policy. Staff are also expected to ensure that they follow Trust policies with regard to professional conduct when using ICT systems or Trust ICT equipment.

### Health and Safety

- Employees are required to work in compliance with the Academy's Health & Safety Policies and under the Health and Safety At Work Act 1974 (as amended), ensuring the safety of all parties they come into contact with, such as members of the public, in premises or sites controlled by the Trust.
- In order to ensure compliance, procedures should be observed at all times under the provision of safe systems of work through safe and health environments, including information, training and supervision necessary to accomplish those goals.

### Safeguarding

- The Thinking Schools Academy Trust is committed to safeguarding and promoting the welfare of children and young people and all staff must ensure that the highest priority is given to following the guidance and regulations to safeguard children and young people. All staff are to have due regard for safeguarding and promoting the welfare of children and young people and to follow the child protection procedures adopted by the Thinking Schools Academy Trust. Any safeguarding or child protection issues **must** be acted upon immediately by informing the Designated Safeguarding Lead.



**Data Protection**

- The Thinking Schools Academy Trust takes the responsibility of protecting and securing the data of Pupils, Staff, Parents and all associated individuals very seriously. The Trust requires all staff to complete data protection training and to adhere to its Data protection policies and procedures. All staff must ensure that if they suspect a data breach they must inform the Trust Data Protection officer immediately.

This job description forms part of the contract of employment of the person appointed to the post. The duties, responsibilities and accountabilities highlighted in this job description are indicative and may vary over time at the discretion of the Trust. This job description will be reviewed annually and is an integral part of the Appraisal and line management process.

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.

I understand and agree to the job description:

Name:

Signed:

Date:



### Person Specification – Finance Business Partner

<b>Knowledge and experience</b>	<b>Essential / Desirable</b>
Sound Knowledge of PS Financials	D
High level of expertise in Excel	D
Experience in working with internal or external auditors	D
Experience in using IMP and in the production of management accounts	D
Experience working in an education setting	E
A knowledge and commitment to safeguarding and promoting the welfare of children, young people and/or vulnerable adults	E
<b>Qualifications and training</b>	<b>Essential / Desirable</b>
Accounting qualification (ACCA/CIMA or equivalent)	D
<b>Personal attributes and skills</b>	<b>Essential / Desirable</b>
Excellent numeracy and analytical skills	E
Excellent communication skills, verbal and written	E
Attention to detail	E
Excellent organisation skills	E
Solution focused approach	E
Able to manage own time, prioritise work and deliver what has been promised to agreed timescales and quality.	E
A positive and constructive team player	E
<b>Additional requirements</b>	<b>Essential / Desirable</b>
Travel to, and work in, academies across the Trust	E