



Birmingham Diocesan Academies Trust

School Finance Partner

Job Title: School Finance Partner, Central Finance Team

Salary: £35,000 - £37,000

Initially based at: BDMAT Offices, 1 Colmore Row, Birmingham

Reporting to: Head of Finance

Terms and conditions; Central staff

JOB DESCRIPTION

Overview

The School Finance Partners are part of the central team of Birmingham Diocesan Multi-Academy Trust (BDMAT) providing finance services to the Trust's schools. Each School Finance Partner operates across a specific number of schools within the Trust (usually around 6) to:

- provide effective and efficient financial management for the schools including the provision of monthly management accounts, budgetary and financial planning;
- support each school in ensuring they are compliant with BDMAT's Financial Regulations.
- develop and implement relevant procedures with the schools to ensure an effective and comprehensive finance function which models best practice and is compliant with legislation, whilst meeting the business needs of the schools and BDMAT;
- provide advice and guidance to senior staff and budget holders within the schools on finance matters; and
- support Trust wide finance work and processes, to include assisting with the development and implementation of BDMAT's Finance Plan.

General responsibilities

- Support the overall Christian ethos of the Trust

- Be aware of and comply with BDMAT's policies and procedures including but not exhaustive of:
 - Acceptable use of IT Policy
 - Whistleblowing Policy
 - Financial Probity Policy
 - Procurement Policy
 - Financial Regulations
- Ensure equal opportunities for all
- Contribute to the overall aims of BDMAT and the individual School Improvement Plans
- Ensure Financial processes and procedures are implemented and applied consistently across the Trust
- Support BDMAT and its schools in achieving best value
- To develop and implement own professional development and skills
- To behave in a manner that is professional, friendly, fair with colleagues demonstrating and role modelling politeness and respectfulness
- To demonstrate an excellent record of attendance and punctuality
- Work cooperatively as part of the BDMAT wide staff team
- Undertake any other duties which may reasonably be regarded as within the nature of the duties and responsibilities of the post.

Specific responsibilities

Management Accounts

- To produce the required monthly management accounts in line with the reporting timetable
- To complete required month-end accounting procedures in line with the reporting timetable
- To report to the Chief Finance and Operations Officer, Head of Finance and Headteachers as required, on the management accounts.

Budgetary Control

- To work closely with the Headteachers and senior leaders within BDMAT schools to ensure the achievement of the agreed budget each year
- Ensure that accounts are managed effectively, including active monitoring to prevent overspend and proposing remedial action where necessary
- Work with Headteachers and other senior leaders to ensure compliance with BDMAT's financial policies
- Review expenditure to ensure value for money, and appropriateness of spend



- Review applications for new and replacement staff posts, fixed term contracts and extension, for strategic relevance and budgetary cover and approve for onward authorisation as appropriate
- Work with School leaders to provide accurate forecasts to the year end as part of the Management Accounts

Budget

- Work with school leaders to develop annual budgets in line with the BDMAT budgeting timetable for approval by the Chief Finance & Operations Officer and the Board of Directors
 - To develop three year budget projections
 - Advice and support school on planning for future staffing requirements and any remedial actions required to ensure the financial sustainability of the school in line with BDMAT requirements

Financial Information

- Producing ad-hoc finance management information (in a format accessible to non-finance specialists), monitoring outturns of each school's various activities against financial plans, updating forecasts and dealing with queries arising. To be responsive to the needs of the Central Team and Headteachers and other stakeholders in providing advice and management information in a timely and user-friendly format.
- Advise Headteachers and their management teams and staff on aspects of financial management.

Training

- Train and communicate with budget holders to ensure that they are adequately skilled in the use of the finance systems and the essential reports for operational budget management

Central Finance

- To take on BDMAT wide projects and responsibilities as required
- Assist with BDMAT wide procurement, producing tender specifications, tender documents, facilitating procurement through frameworks, obtaining Trust wide quotes and assisting the negotiations of BDMAT wide contracts

Capital

- Work with Schools to monitor and control capital expenditure on buildings and grounds, placing of contracts and/or liaising with central teams where these have been procured to manage projects on behalf of BDAT.



Financial Year-End

- To ensure that year-end accounting procedures within schools are processed in an efficient and timely manner in accordance with set deadlines.
- Assist with the preparation of BDMAT financial statements and any required Government returns

Procurement

- Managing the tendering for BDMAT's schools service contracts including the preparation of tender documents; procuring specialist procurement advice and to work to prepare tender documents where expenditure exceeds financial limits

Governance

- Attend meeting of the Local Academy Body as requested by the Headteacher
- To ensure that schools adhere to BDMAT's finance policies and develop systems/procedures to enable this
- Provide general support to schools on compliance including GDPR and Health & Safety etc

Other

- Other duties as requested by the Head of Finance or Chief Finance and Operations Officer. This job description sets out current duties of the post that may vary from time to time without changing the general character of the post or the level of responsibility entailed.
- Developing and maintaining effective working relations as appropriate to ensure an effective and professional finance services is provided

PERSON SPECIFICATION

The person specification shows the abilities and skills you will need to carry out the duties in the job description. **Applicants must address each point of the person specification sequentially within the statement of suitability within their application. Applications where this has not been fulfilled will not be considered.** Short listing is carried out on the basis of how well you meet the requirements of the person specification. **You should mention any experience you have had which shows how you could meet these requirements when you fill in your application form. Applications must be on a BDAT application form.**

The Panel will use the following assessment tools:

- Application form including supportive statement
- Interview/assessment activities
- Reference and other employment checks

(E = essential D = desirable)

Education and Training

| | E/D | Application & Supportive Statement | Interview | Assessment Activities |
|---|-----|------------------------------------|-----------|-----------------------|
| 1. Fully qualified accountant – CCAB recognised accountancy qualification or working to towards or substantial relevant experience | E | ✓ | | |
| 2. Take responsibility for own professional development and of maintaining links with appropriate bodies in order to enhance knowledge and sharing of information | E | ✓ | | |

Knowledge

| | E/D | Application & Supportive Statement | Interview | Assessment Activities |
|--|-----|------------------------------------|-----------|-----------------------|
| 3. Knowledge of academy financial controls and regulations | D | ✓ | ✓ | |
| 4. Ability to produce budgetary estimates, reports, cash flow and financial and statistical summaries, ideally combined with operational experience | E | ✓ | ✓ | ✓ |
| 5. Knowledge of principles and methods of financial control and reporting and their adaptation to various purposes, including the preparation of management accounts | E | ✓ | ✓ | ✓ |

Experience

| | E/D | Application & Supportive Statement | Interview | Assessment Activities |
|---|-----|------------------------------------|-----------|-----------------------|
| 6. Financial management experience | E | ✓ | ✓ | |
| 7. Experience of budgeting and monitoring complex activities | E | ✓ | ✓ | ✓ |
| 9. Experience of leading services that are deliver across multi locations | D | ✓ | ✓ | |
| 10. Experience of working flexibly in an environment of constant change | D | ✓ | ✓ | |
| 11. Experience of liaising effectively with outside agencies | D | ✓ | ✓ | |

Professional Skills

| | E/D | Application & Supportive Statement | Interview | Assessment Activities |
|---|-----|------------------------------------|-----------|-----------------------|
| 12. Strong interest in systems and process which will add value and assist in managing change in a finance environment | E | ✓ | ✓ | |
| 13. Excellent interpersonal skills and a track record of establishing and promoting effective working relationships | E | | ✓ | |
| 14. Clear and persuasive communication skills, written and oral, including the ability to negotiate effectively | E | ✓ | ✓ | ✓ |
| 15. Excellent organisational skills, with the ability to plan and balance priorities, maintaining high standards while working accurately and effectively | E | ✓ | ✓ | ✓ |
| 16. Customer focused attitude and proven ability to deliver service improvement and work to deadlines | E | ✓ | ✓ | |

Personal Qualities

| | E/D | Application & Supportive Statement | Interview | Assessment Activities |
|---|-----|------------------------------------|-----------|-----------------------|
| 18. Enthusiastic, motivated and committed | E | ✓ | | |
| 19. Ability to work as part of a team understanding BDMAT and schools roles and responsibilities and your own position within these | E | ✓ | ✓ | |
| 21. Commitment to Equal Opportunities | E | | ✓ | |
| 22. Proactive, positive and resilient | E | ✓ | | |
| 23. Willingness to work within the Christian framework of BDMAT | E | ✓ | | |

This role is subject to a satisfactory DBS check.



