



# Finance Business Partner Candidate Information

## Ensuring Excellence

Dimbleby House,  
Stoneydelph Primary School, Crowden Road, Tamworth, B77 4LS  
01827 702216

## About the Role

It's a really exciting time to join the team at Community Academies Trust as Finance Business Partner.

Working within the central finance function and supporting the Chief Finance Officer & Trust Executive Group, you will be on an exciting journey to develop and implement best in class.

Forward thinking and strategically focused, the finance business partnering function will work closely with the schools to support and advise financial planning, budgeting & analysis including payroll reconciliation to ensure that deadlines are met, whilst maintaining confidentiality of information assisting with day-to-day aspects of financial management.

You will join a friendly team, the role includes some agile working and normally based in modern offices at one of our school sites in Tamworth. Regular travel to other schools within the Trust will be required.

Applications are welcomed from experienced candidates with ongoing CPD and training opportunities are available which include funded external accreditations and qualifications - such as completing AAT/CCAB qualification.

This is a full time permanent role (whole year) and we welcome applications with consideration to include hybrid working. Please make your preference clear in your application.

Should this role be of interest then we would love to hear from you!

For more information visit: [www.communityacademiestrust.org](http://www.communityacademiestrust.org)

Should you require any other details or for an informal discussion (or to arrange a short Teams meeting to discuss further) please contact Lois Gordon, Executive Director, Finance & Operations on [lgordon@catschools.uk](mailto:lgordon@catschools.uk), telephone 07880 541328 or Karen Smith, Business Support Manager, by emailing, [ksmith@catschools.uk](mailto:ksmith@catschools.uk)

Closing date for applications: **Sunday 24th March 2024**

Interviews will take place week beginning: **to be confirmed**

**Please note an application form must be completed in order to apply for this vacancy.**

We may review applications before the application review date, however, if you apply after the application review date, your application may not be considered. We will accept applications until we have successfully filled the role, this may be earlier than the closing date.

Community Academies Trust is committed to safeguarding and promoting the welfare of children and young people. Community Academies Trust is exempt from the Rehabilitation of Offender Act 1974. We expect all staff to share our safeguarding commitments and to undergo appropriate safer recruitment checks, including enhanced DBS checks and a willingness to demonstrate commitment to the standards which flows from Community Academies Trust vision and values.

Community Academies Trust  
Human Resources  
Dimpleby House, Stoneydelph Primary School, Crowden Road, Tamworth, B77 4LS  
Tel: 01827 702 216

Community Academies Trust supports Equal Opportunities Employment.  
Community Academies Trust Company Registration No. 0747273-6

## LETTER FROM PHILIP HAMILTON OBE

### Chief Executive Officer



#### Dear Applicant

Thank you for taking the time to read about this exciting opportunity to join the Community Academies Trust's central team. I hope you find the information in this pack helpful.

Our Trust originated as The Polesworth School Academy Trust and then became the Community Academies Trust after going into partnership with Birchwood Primary School in November 2012. The Trust has grown since 2012 and now comprises three secondary schools and thirteen primary schools in Warwickshire, Staffordshire and Telford.

We are proud of our community school based origins and organise ourselves so that schools operate locally, sharing resources and excellent practice with other Community Academies Trust schools that are geographically close. The CAT central team is located at purpose built office in the grounds of Stoneydelph Primary School in Tamworth, close to our other North Warwickshire and Staffordshire schools.

Our Trust is a values driven organisation, believing fundamentally in the talent of young people and is driven to ensure local communities have exceptional schools. As a high performing sponsor, the Trust has a track record of improving schools and if successful you will be part of a team to ensure schools in our Trust are:

- Focused on achieving excellent academic, personal and social outcomes for our children
- Committed to the moral imperative of community school improvement and shared system leadership
- Mutually supportive, not in competition with each other but fiercely loyal to each other
- Equal partners with all other schools irrespective of their phase, size or successes
- Multi academy trust minded - our schools celebrate the success of others as well as themselves and share accountabilities
- Financially disciplined and committed to fulfilling their delegated responsibilities to the best of their abilities under a robust governance arrangement

This culture and ethos ensures the young people in our care benefit from expertise and support shared across all our schools so that we can maintain our attention to our children's individual talents and potential. I use this story to illustrate my own personal commitment to the children in our schools:

*"As the old man walked the beach at dawn, he noticed a young man ahead of him picking up starfish and flinging them into the sea. As he caught up with the youth, he asked him why he was doing this. The answer was that the stranded starfish would die if left until the morning sun. The old man said that there were millions of starfish, and how could he possibly make a difference. The young man looked at the starfish in his hand, and threw it into the waves to safety "it makes a difference to this one" he said.*

The main message from this story is clear - children will thrive if we all make sure we focus on them as individuals, get to know them well, meet their needs and be ambitious for them.

Our schools are orientated around ensuring excellent provision and are constantly reflecting on what is best for our working environment and for the young people in our care. All of us at our Trust want the children to achieve socially, personally and academically and leave school with a crucial sense of possibility - vital for success in life.

When you work with us, we are also keen that you will grow as a professional and benefit from a culture of professional development. Your professional growth is very important to us and we have the capacity through our school networks and the Trust wide Institute of Education to support you in your work and career

More information about our Trust is available on our website at: <http://www.communityacademiestrust.org>

Good luck with your application.

Yours sincerely



Philip Hamilton OBE  
Chief Executive Officer

***"Education is for improving lives and for leaving  
your community and world better than you found it"***

## 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, pupils will achieve more than they ever thought possible. They are also values that have evolved following a sustained period of success for our schools.



## Our Young People

We value three main types of achievement for our young people, and the vision for our schools 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 (learn what to do when they don't know what to do) so that they 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 schools planned curriculum. We have a vital role in ensuring individuals develop their own talents and interests and have 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's community will ensure learning can be fun in a disciplined and caring environment where the highest expectations are the norm.

# Job Description

## Finance Business Partner

£33,945 - £36,648 per annum (scale J point 25 - 28)  
plus an excellent pension (LGPS)

**LOCATION:** CAT Central (hybrid working to be discussed at interview) regular visits to Trust schools

**WORKING PATTERN:** Full time - 37hrs per week – permanent, whole year

**DISCLOSURE LEVEL:** Enhanced

### Key Relationships:

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

### Responsible For:

Reporting to the Business Support Manager, 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 and investment management.

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

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 no direct staff line management responsibility.

**Responsibility for budget:** Responsibility for individual school budgets rests with the Heads and governors. However, this position has significant influence in supporting them to make difficult budgeting decisions which impact on individual schools and our Trust.

**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 Business Support Manager. 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.



# Job Description

## 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 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 annual and 5-year budgets for local governors and the Trust Executive Group.
- Collaboration with the school office staff and Headteachers to prepare monthly management accounts including forecasts and variance analysis identifying financial risks and opportunities including income generation, updating the 5-year budgets where appropriate.
- Assist and support the Business Support Manager to produce monthly written reports for the Trust Executive Group, Headteachers, Governors and Trustees on the school's financial performance.
- Produce costing for alternative scenarios and advise Headteachers on the options available. Make recommendations in line with experience.
- Collate monitoring and budget planning information for the central team. Inform the Business Support Manager of any serious concerns about 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 present complex financial information to community stakeholders.
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- Support the school office staff with processing insurance claims.
- Support the school office staff in carrying out monthly payroll reconciliations.
- Support the school office staff in 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, attending trust wide events.
- Ensure the correct VAT treatment for school income is compliant and implemented accurately and consistently.

# Job Description

## Support to Trust

- Support school office staff in the operation of the Trust Finance system.
- Support school office staff and headteachers in the operation and application of Trust financial procedures and policies.
- Collaboration with colleagues in the central team to review and revise financial policy, procedures and processes.
- Collaboration 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 school office staff in completing 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 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 Business Support Manager.
- 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 the role.

## New Schools

- Support the CFO and Business Support Manager 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.

# Job Description

## Health and Safety

All employees are expected to maintain a healthy and safe work environment.

## Safeguarding Children

CAT 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

	Essential	Desirable
<b>Qualifications</b>	<p>Willing to work towards qualification or equivalent. Eg CCAB qualified or part qualified.</p> <p>5 GCSEs (or equivalent) including English and maths at grade A-C or equivalent.</p>	<p>AAT qualification and/or CSBM (DSBM) and/or CIPFA qualification in Financial Reporting for Academies.</p>
<b>Experience, skills and knowledge</b>	<p>Experience working in an office environment.</p> <p>Use of ICT, financial software packages and other specialist equipment.</p> <p>ICT literate and able to use the internet, operate Microsoft using complex formula or similar office packages, produce analyses, use email etc.</p> <p>Experience of setting budgets, forecasting &amp; out turns.</p> <p>Interest in education finance.</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>Analytical and problem-solving skills.</p> <p>Attention to detail with accuracy and precision.</p>	<p>Previous experience as a School Business Manager, Finance Business Partner, or similar role.</p> <p>Project management.</p> <p>Experienced in procurement to achieve best value.</p>

## Person Specification

<b>Personal qualities</b>	<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>Maintain confidentiality at all times and recognises privileged position with access to staffing and financial information.</p> <p>Open, honest and an active listener.</p> <p>Takes 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>	
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## Person Specification

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 licence and access to vehicle 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>	
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