



## **JOB DESCRIPTION & PERSON SPECIFICATION**

**JOB TITLE:** Finance Partner

**REPORTS TO:** Senior Finance Partner

**SALARY:** To be negotiated

**HOURS:** The hours are flexible to meet the demands of our service delivery. Although predominately worked during school term time, there may be a requirement to carry out some work during school holiday periods – this is a maximum of 3 weeks work per academic year. Although we work flexibly, to meet the needs of our clients, we do not expect staff to take time off during term time.

**Location:** Avec is based in Newton Aycliffe although work across the North East and Yorkshire regions. We support all of our team with the ability to work from their home, when appropriate, although a hot desk facility is available, which is based in Newton Aycliffe. This will be discussed with you upon appointment.

### **PURPOSE OF POST:**

- To provide high quality finance advisory services to our schools and academies.
- To ensure that the Finance function proactively supports the best interests of all the schools and academies we work with to achieve their objectives.
- To actively promote the business, generating new clients and retaining existing clients across the North of England region.

### **KEY OUTCOMES**

The post holder will be expected to achieve the following outcomes.

- To provide specialist hands on support and advice to CEO's Head Teachers, School Business Managers, Senior Managers and Governors in relation to a wide range of finance issues.
- To aid in the development of multi-year financial planning and cash-flow management

- To support clients with budget modelling, preparation, forecasting and monitoring and year-end account reconciliation
- To support clients with planning efficiency reviews and aligning school curriculum priorities with budgetary constraints.
- To ensure that each school's financial year is closed down in a timely and accurate manner, and that the final accounts are completed and prepared accurately
- To produce financial reports and present these to Trust Boards and Governing Bodies
- Supporting schools to ensure they have appropriate and effective financial systems in place in accordance with agreed policies and timetables;
- Supporting school and academies in ensuring accurate financial records are maintained.
- Supporting schools and academies in ensuring that financial transactions in the school are carried out in an appropriate manner and that the financial regulations are observed, including all arrangements for VAT.
- Research and plan new systems and procedures for financial processes.
- Support schools and academies in procuring services and undertaking financial evaluations to secure value for money and ensuring compliance with procurement responsibilities.
- Keep abreast of financial developments across the Educational Sector, notably in relation to the Academies Sector.
- To ensure that CEOs, Head Teachers, Governors and staff receive effective and appropriate advice and support on all practical aspects of financial management.
- To be able to assist in the Academy Conversion Process as part of a project management team, providing relevant support with finance issues.
- To support clients with procurement exercises where necessary
- To build up effective, collaborative, dynamic relationships with all of our schools and academies.
- To actively seek out feedback in order to maintain positive relationships and professional credibility.
- To be responsible for leading your own work, with support and supervision, proactively dealing with your workload in a creative and flexible working environment.
- To work collaboratively with the HR, Governance and H&S arms of the team, to offer schools a seamless service.

## OTHER DUTIES

- To develop an understanding of varying policies and procedures within the schools and academies, complying with their contents and raising concerns.
- To maintain personal and professional development to meet the changing demands of the job, participate in appropriate training activities and encourage and support staff in their development and training.

Given the dynamic nature of the role and structure of Avec, it must be accepted that, as the Company's work develops and changes, there will be a need for adjustments to the role and responsibilities of the post. The duties specified above are, therefore, not to be regarded as either exclusive or exhaustive. They may change from time to time commensurate with the grading level of the post and following consultation with the member of staff.

***The successful applicant will be subject to relevant vetting checks, including a satisfactory enhanced disclosure before an offer of appointment is confirmed. Following appointment the employee will be subject to re-checking as required from time to time.***

Avec is committed to safeguarding and promoting the welfare of children and expects all staff to share this commitment.



	Criteria	Essential / Desirable	Key
<b>Education and Qualifications</b>	Part or fully qualified accountant	D	AF/C
	AAT level 4 or equivalent	E	AF/C
	Evidence of continuous professional development	D	AF
	5 GCSE's including English and Maths Grade C+ or equivalent	E	AF/C
<b>Work Experience</b>	Minimum of 3 years experience in a relevant field	E	AF/I
	Experience of working in the education and/or local government sector	D	AF/I
	Experience of providing financial advice and support	E	AF/I
	Experience of dealing with a wide range of people in a diplomatic and professional manner	E	AF/I

	Experience of budget monitoring, account reconciliation and producing standard financial reports	E	AF/I
	Experience of producing complex budgets	E	AF/I
<b>Knowledge and Skills</b>	Knowledge of the financial requirements of academies and schools	D	AF
	An understanding of the key financial issues facing schools and academies	D	AF/I
	Effective written and verbal communication and presentation skills.	D	AF/I
	Effective IT skills, using technology to enhance the service provided to our customers.	E	AF/I
	Working knowledge of Excel and Word	E	AF/I
	Ability to assist with the production of accurate records and reports as required	E	AF
	Ability to show sensitivity and objectivity in dealing with confidential issues	E	AF/I
	Personal effectiveness – excellent organisational skills, ability to prioritise and manage workload proactively	E	AF

	Ability to seek out, manage and influence opportunities for continuous improvement and change	E	AF/I
	Ability to ensure that the highest standards of quality and customer care are achieved	E	AF
	Ability to analyse written and financial information highlighting variances and trends	E	I
<b>Other Requirements</b>	Ability to work flexibly during school term times, attending meetings and events outside of normal working hours.	E	AF/I
	A commitment to working as part of the Avec team and supporting the vision and aims of the company	E	AF
	Flexibility to work a small amount of weekend working.	E	AF
	Ability to travel independently.	E	AF
	Suitability to work within the education environment	E	D

**Key:**

**AF** – Application Form      **C** – Certificates      **I** – Interview      **D** - Disclosure