

## Job Description

Post Details	Last Updated: June 2024
<b>Job title</b>	Finance Transformation Manager
<b>Department</b>	Central Finance
<b>Grade</b>	LPT 10
<b>Place of work</b>	Learning Partners Academy Trust central team offices in Guildford
<b>Responsible to</b>	Head of Finance
<b>Responsible for</b>	N/A
<b>Internal communication</b>	Cross-functional Central Team, Central Finance Team, School Business Managers and Local Finance Personnel.
<b>External communication</b>	N/A

### A. Job Purpose Statement

Reporting to the Head of Finance, this post will lead on delivering a new school centered operational finance model. The updated model will allow delivery of finance using a grouped school structure, ensuring financial resilience as the trust continues to grow. The post will be instrumental in working with schools to develop and implement a model ensuring financial data accuracy, where internal control frameworks are adhered to, and statutory and regulatory financial reporting requirements are met. The model will ensure the needs of the schools are maintained or enhanced, allowing relevant and up to date information for decision making purposes.

### B. Core Purpose of Role

*This is not designed to be a list of all tasks undertaken but an outline record of the main responsibilities.*

#### Operating Model Project Management

- Carry out detailed scoping and planning of project, in line with the overarching approved timeline.
- Lead and be responsible for project implementation and delivery of the new model, adapting the solution to one that ensures the best fit for each school group.
- Become the project expert, ensuring credibility across all levels of the business.
- Work cross functionally, to ensure the new model is both fit for purpose and the best fit for the trust.
- Provide detailed project reporting and regular updates to the HoF and the executive team
- Build strong relationships with headteachers, school finance teams and the central team, understanding the needs and aspirations of schools and individual team members.
- Ensure engagement and buy-in across the organisation, leveraging feedback and ensuring

- To ensure project success, the post holder will need to;
  - Understand the current central and school financial operating model.
  - Learn and understand current finance systems and processes.
  - Make recommendations for best practice across all areas of finance.
  - Recommend solutions that, where possible, meet the needs and aspirations of existing team members.
  - Work with the Finance Analyst to implement new systems as required and in conjunction with the project plan.

### **Operational Finance – Central & Schools**

- While not directly responsible for the following the post holder is expected to gain an understanding of the following areas of responsibility, allowing them to be able to support both the central and school finance communities as required;
  - Month end process, including the provision of accurate management accounts.
  - Preparing and inputting the accruals, prepayments, accrued and deferred income
  - Payroll procedures
  - Banking platforms
  - BACs and payment processing
  - Requisition and purchase order processing
  - Production of Financial monitoring reports
  - Use the budget software to update budgets and forecasts.
  - FMR production
  - Carry out variance analysis and adhoc reporting as required.
  - Support in the planning of Internal and External Audit activities.
  - Review and ensure accuracy and understanding of trust wide financial reporting, including consolidated reports and budgets.
  - Provide support and challenge to schools, where required, on the accuracy of financial information produced.

Additionally the post holder will be expected to:

- Provide support to more junior members of the finance team contributing to their on-going development.
- Regularly review and make recommendations on improvements to systems, processes, and procedures.
- Ensure a consistent, compliant approach to accounting across all schools
- Provide technical accounting advice, including VAT advice to finance personnel and SBMs working across the trust, to deliver a professional service for our schools and business units, meeting trust-wide expectations.
- Recommend and provide training to relevant staff as required.

### **Financial Standards**

- Work collaboratively as part of the finance team to identify, devise and implement more effective and efficient finance procedures and assist in the dissemination of these across the trust.
- Encourage and support the promotion of good financial management, regularity and propriety across the trust.
- Deliver excellent internal customer service to all staff involved in financial procedures throughout the trust.

### **All Learning Partners Employees**

- All employees may undertake any other reasonable duties expected of them, commensurate with their grade, as directed by their line manager and/or the CEO.
- All Learning Partners employees are expected to follow the employee code of conduct and are thereby required to have due regards for safeguarding, health and safety in the workplace regulations, promote equal opportunity, exercise professionalism and uphold the values of member schools and Learning Partners.

### **C. Expectations**

*All Staff are expected to:*

- Contribute effectively to raising student achievement and maintain a positive and supportive culture where all can fulfil their potential and be happy.
- Positively support equality of opportunity and equity of treatment to colleagues and students.
- Help maintain a safe working environment by:
  - Attending training in Health and Safety requirements as necessary, both on appointment and as changes in duties and techniques demand.
  - Following local codes of safe working practices and the School's Health and Safety Policy.
- This post is classified as having substantial access to children and appointment is subject to an enhanced police check of previous criminal convictions (DBS). Applicants are required, before appointment to disclose any conviction, caution or binding over including 'spent convictions' under the Rehabilitation of Offenders Act 1974 (Exemptions) Order 1975. Non-disclosure may lead to termination of employment. However, disclosure of a criminal background will not necessarily debar from employment – this will depend upon the nature of the offense(s) and when they were recorded.

Learning Partners Academy Trust is committed to safeguarding and promoting the welfare of children, young people and vulnerable adults and we expect all staff and volunteers to share this commitment.

### **D. Summary**

Every effort has been made to explain the main duties and responsibilities of this role, however, each individual task undertaken may not be explicitly identified. You will be expected to comply with any reasonable request from the CEO to undertake work of a similar level not specified in this job purpose.

As the Trust and the post-holder develop, there will inevitably be some changes to the duties for which the post is responsible, and possibly to the emphasis of the post itself. The Trust expects that the post-holder will recognise this and will adopt a flexible approach to work. This could include undertaking relevant training if necessary.

Should significant changes to the job purpose become necessary, the post-holder will be consulted and the changes reflected in a revised job purpose.

## F. Person Specification

This section describes the knowledge, experience and competence required by the post holder that is necessary for standard acceptable performance in carrying out this role.

		Essential /Desirable
<b>Skills, attributes and knowledge</b>	<ul style="list-style-type: none"> <li>Relevant professional accountancy qualification (ACA, ACCA, CIMA, CIPFA)</li> </ul>	E
	<ul style="list-style-type: none"> <li>Educated to Degree Level or Equivalent</li> </ul>	E
	<ul style="list-style-type: none"> <li>PRINCE2 qualified</li> </ul>	D
	<ul style="list-style-type: none"> <li>Demonstration of an on-going commitment to own professional development</li> </ul>	E
	<ul style="list-style-type: none"> <li>Experience of working in a finance function (at least three years)</li> </ul>	E
	<ul style="list-style-type: none"> <li>Experience of working in a school or education environment</li> </ul>	D
	<ul style="list-style-type: none"> <li>Proven experience of financial and budgetary controls</li> </ul>	E
	<ul style="list-style-type: none"> <li>Proven experience of computerised bookkeeping and management information systems</li> </ul>	E
	<ul style="list-style-type: none"> <li>Ability and knowledge to produce budgets, reports, cash flow, and financial and statistical summaries.</li> </ul>	E
	<ul style="list-style-type: none"> <li>Excellent literacy, numeracy and ICT skills (Excel – Intermediate / Advanced)</li> </ul>	E
	<ul style="list-style-type: none"> <li>A willingness to seek advice and awareness of where to seek it</li> </ul>	E
	<ul style="list-style-type: none"> <li>Proven planning, organisational and time management skills</li> </ul>	E
	<ul style="list-style-type: none"> <li>Excellent written and verbal communication skills</li> </ul>	E
	<ul style="list-style-type: none"> <li>Proven interpersonal skills and ability to work in partnership with a diverse range of stakeholders</li> </ul>	E
	<ul style="list-style-type: none"> <li>Enthusiasm, optimism and energy</li> </ul>	E
<b>Experience</b>	<ul style="list-style-type: none"> <li>Ability and willingness to work flexibly, including attending meetings off-site or out-of-hours</li> </ul>	E
	<ul style="list-style-type: none"> <li>Ability to prioritise &amp; manage a variable workload</li> </ul>	E
	<ul style="list-style-type: none"> <li>Driving licence as may be required to attend meetings off the site</li> </ul>	E
	<ul style="list-style-type: none"> <li>Financial planning and analysis, including budget setting in an academy or other organisation</li> </ul>	E
	<ul style="list-style-type: none"> <li>Experience of working with a range of stakeholders</li> </ul>	E
	<ul style="list-style-type: none"> <li>Experience of producing financial and management accounts and budgetary control</li> </ul>	E
	<ul style="list-style-type: none"> <li>Proven experience of managing change projects</li> </ul>	D
	<ul style="list-style-type: none"> <li>Experience of recommending and supporting the implementation new processes</li> </ul>	D
	<ul style="list-style-type: none"> <li>Sound knowledge of educational systems</li> </ul>	D

Signed: \_\_\_\_\_

Date: \_\_\_\_\_