



Regional Finance Lead

Role Profile and Personal Specification

Job Title:	Regional Finance Lead
Division:	Finance Directorate
Grade Range:	Grade 11-15 (SCP 33 – 43) dependent on experience
Salary Range:	£44,019 – £54,129
Hours/weeks:	36 Hours, Full time, 52 weeks
	Remote working with +- 2 Days in the office, occasional visits to schools
Office Location:	Bourne House, Business Centre, 475 Godstone Rd, Warlingham, Whyteleafe CR3 0BL
Line Manager:	Report to Chief Financial Officer

Main purpose of this Role:

Regional Finance Leads play a key strategic role with financial oversight of all schools within their assigned region. Reporting to the Chief Finance Officer, the post holder is responsible for robust, accurate and timely budget setting and monitoring reports, and ensuring compliance with statutory guidance and Trust policy and procedure. Working closely with Headteachers and other senior Trust staff, the post holder will provide scenario and benchmarking analysis to support decision making, clearly communicating assumptions. As the key Trust finance contact for assigned Local Authority partner(s), the post holder will work proactively and independently to ensure an accurate, in-depth understanding of Local Authority High Needs funding methodology and the impact of DfE statutory guidance, driving improvements in information sharing and income reconciliations.

KEY DUTIES AND RESPONSIBILITIES

Budget Monitoring and Analysis:

- Work closely with Headteachers and Executive Heads to prepare robust budgets for all schools within your region, clearly documenting assumptions and risks.
- Support Finance Officers with effectively monitoring delivery against budgets, including regular updates to forecasts (using the Trust Budgeting System). Provide monthly monitoring reports and supporting narrative (for Trust level consolidation) based on latest outturn figures.
- Decision-making support to School Leadership Team and Trust Executive Leaders, including provision of scenario analysis, trend analysis and benchmarking analysis.
- Assist senior stakeholders with development and delivery of financial plans, including re-structuring and zero-based budgeting analysis, where necessary.
- Ad-hoc analysis where required, for example a deep-dive analysis into a particular spend area, to identify opportunities for efficiency, or financial modelling to support new projects.

Audit and Financial Accounts:

- Ensure accurate year-end accrual and pre-payment adjustments are made, with supporting documentation to evidence assumptions (working with Finance Business Partners and Chief Finance Officer).

- Engagement with payroll services to ensure accurate payroll journals and reconciliation of the payroll control account, providing oversight of other key month-end checks, including those delegated to Finance Business Partners.
- Regional Lead for annual external and internal audit process – ensuring accurate information is provided and queries answered on a timely basis (working with Finance Business Partners).

System Improvements:

- Support the Chief Finance Officer on the effective delivery of key financial and Trust development activities to support the Trust's strategic objectives.
- Support the Chief Finance Officer in preparation of Trust-wide financial manuals, training and guidance notes.
- Support the Chief Finance Officer in identifying opportunities for efficiencies and implementing key finance system improvements where required.
- Assist in the development of Trust wide financial policies to ensure they are up to date, fit for purpose and compliant with the ESFA's requirements.
- Ensure the accounting software is fit for purpose and used to its full potential and in line with the Trusts instructions.

Local Authority Engagement:

- Be the main Trust finance contact for assigned Local Authorities, building strong relationships with key Finance and SEND team contacts.
- Build and maintain an in-depth understanding of the High Needs Funding methodology and supporting processes and procedures within your area, quality assuring calculations and ensuring schools receive the maximum income they are entitled to.
- Ensure Local Authority calculations are compliant with the latest High Needs Operational Guidance.
- Ensure accurate and detailed invoicing and reconciliation of Local Authority income received (including Out of Area pupils), quality assuring the work completed by Finance Business Partners and where support is provided.

LEADING AND MANAGING PEOPLE

At all times:

- To lead, motivate, support, challenge and develop other people in order to secure improvement.
- To work across the delivery area and with other Trust and school leaders, providing a solution focused approach to service delivery and exhibiting the principles of servant leadership.
- To provide expert advice to the Trust executive; Trustees; and local governors as and when required and to support the delivery of the Trust strategic plan.
- To maximise the contribution of all Trust employees and volunteers to improve the quality of education provided and standards achieved and ensure that constructive working relationships are formed between staff and pupils.
- Line management responsibility for your regions Finance Officers.
- To plan, allocate, support and evaluate work undertaken to deliver on the Trust's 5-year Strategic Plan.

SAFEGUARDING

The Beckmead Trust is committed to safeguarding and promoting the welfare of children and young people. The highest priority must be given to following the guidance and approaches to safeguard children and follow all safeguarding procedures outlined by the MAT and member schools.

POLICIES

Green Statement:

Seek opportunities for contributing to sustainable development of the borough, in accordance with the Trust's Green Commitment. In particular, demonstrate good environmental practice (such as energy efficiency, use of sustainable materials, sustainable transport, recycling and waste reduction) in management of the service provision.

Data Protection:

- To be aware of the Trust's responsibilities under the Data Protection Act 1984 and GDPR May 2018 for the security, accuracy and relevance of personal data held on such systems and ensure that all administrative and financial processes comply with this.
- To maintain client records and archive systems, in accordance with departmental procedure, policy and statutory requirements.

Confidentiality:

You are expected to treat all information acquired through your employment, both formally and informally, in strict confidence. There are strict rules and protocols defining employees access to and use of the Trust's databases. Any breach of these rules and protocols will be regarded as subject to disciplinary investigation. There are internal procedures in place for employees to raise matters of concern regarding such issues as bad practice or mismanagement.

Equalities and discrimination:

The Trust has a strong commitment to achieving equality of opportunity in its services to the community and in the employment of people. It expects all employees to understand, comply with and to promote its policies in their own work, to undertake any appropriate training and to challenge racism, prejudice and discrimination. This includes respecting and valuing the different experiences, ideas and backgrounds others can bring to work and to teams.

Health and Safety:

Every employee is responsible for their own Health & Safety, as well as that of colleagues, service users and the public. Employees should co - operate with management, follow established systems of work, use protective equipment where necessary and report defectives and hazards to management.

PERSON SPECIFICATION

		Essential	Desirable
Qualifications	Qualified Accountant (ACA, ACCA, CIMA, CIPFA).		•
	Level 4 Qualification (Degree or equivalent) or commensurate experience	•	
Experience	Proven track record in a senior position of a significant finance function	•	
	Experience of designing, implementing and maintaining financial management processes and controls	•	
	Financial reporting including skills and experience of working with stakeholders to develop strong financial understanding	•	
	Demonstrable understanding of the principles and practice of identifying and managing risks	•	
	Experience of producing and presenting complex management accounts	•	
	Track record in effective budget preparation and control, working across multiple entities	•	
	Experience of working in accordance with statutory regulations and working knowledge of academy financial rules and regulations.	•	
	Experience of managing teams	•	
	Experience of generating income and preparing bids for grant funding		•
	Ability to successfully manage initiatives for change	•	
	Knowledge of the funding, regulatory and legislative environment of academies	•	
	Experience of working in a school, single academy or multi-academy trust financial management role or equivalent, with a working knowledge of schools' finance systems		•
	Knowledge of Special Educational Needs and Disabilities (SEND) funding		•
	Commercial awareness and ability to achieve value for money	•	
	Strong MS Excel skills (comfortable using pivot tables, v-lookups, understanding formulae)	•	
Thinking Ability	An analytical thinker who can process complex information quickly and rigorously in order to recommend effective decision making	•	
	Can demonstrate sound judgement to undertake complex tasks in a systematic way	•	
	Ability to analyse financial issues and interpret complex information	•	

		Essential	Desirable
	Thinks creatively and imaginatively to solve problems and identify opportunities	•	
	Able to demonstrate having planned appropriately for future success	•	
	Strong attention to detail – able to interrogate data and calculations provided by others, and identify key questions and inconsistencies	•	
	Understands rationale for processes and procedures and their role within wider systems of control	•	
Personal Effectiveness	High ethical standards and influencing skills with the ability to engage effectively with all staff across the Trust	•	
	Self-confident with the ability to communicate effectively and tailor communication to different audiences	•	
	Proactive and self-motivated. Able to independently identify areas for investigation and drive things forward	•	
	Able to lead discussions in key meetings, being assertive and challenging others where required	•	
	Works reliably under pressure to produce timely, accurate information and is willing to do whatever necessary to bring about results	•	