

### Person Specification

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|-------------------|--|
| <b>JOB TITLE:</b> | <b>Finance and Business Services Partner</b> |
| <b>DATE:</b>      | <b>November 2022</b>                         |
| <b>STATUS:</b>    | <b>Version 1.0</b>                           |

| CRITERIA  | Essential/<br>Desirable | Application | Tasks | Interview | Vetting<br>checks |
|---|-------------------------|-------------|-------|-----------|-------------------|
| <b>Knowledge and qualifications</b>   |                         |             |       |           |                   |
| 1. A good general education demonstrating numeracy and literacy.  | E                       | ✓           |       |           |                   |
| 2. A School Business Manager qualification or a relevant degree qualification   | D                       | ✓           |       |           |                   |
| 3. Evidence of relevant continuous professional development   | D                       | ✓           |       |           |                   |
| <b>Experience</b>   |                         |             |       |           |                   |
| 4. A minimum of three years' experience in a financial role   | E                       | ✓           |       | ✓         | ✓                 |
| 5. Successful experience of working in a school or academy financial management role, or in a similar position working alongside schools i.e. working for the Local Authority or the Independent education sector | E                       | ✓           |       | ✓         | ✓                 |
| 6. Experience of managing budgets   | E                       | ✓           |       | ✓         | ✓                 |
| 7. Experience of producing and presenting documentation   | D                       | ✓           |       |           | ✓                 |
| 8. Experience of driving through organisational change  | D                       | ✓           |       | ✓         | ✓                 |
| 9. Experience of developing academy systems, processes and procedures   | E                       | ✓           |       | ✓         | ✓                 |
| 10. Experience of operating financial systems with integrity and accuracy   | E                       | ✓           |       |           | ✓                 |
| 11. Experience of leadership roles within public/private sector setting   | D                       | ✓           |       | ✓         | ✓                 |

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|--|-------------------------|-------------|-------|-----------|-------------------|
| 12. Knowledge of academy financial rules and regulations   | E                       | ✓           |       |           | ✓                 |
| 13. Experience of completing applications to secure extra funding  | D                       | ✓           |       |           | ✓                 |
| 14. Experience of forming business partnerships, especially in an educational context  | D                       | ✓           |       |           | ✓                 |
| <b>Skills and competencies</b>   |                         |             |       |           |                   |
| 15. Excellent financial management and financial planning skills   | E                       | ✓           |       | ✓         | ✓                 |
| 16. Ability to analyse financial issues and to interpret complex information and to offer sound, reliable, professional advice   | D                       | ✓           | ✓     |           | ✓                 |
| 17. Commercially awareness and ability to achieve value for money  | E                       | ✓           |       | ✓         | ✓                 |
| 18. Competent and confident in using Microsoft Office  | E                       | ✓           |       | ✓         |                   |
| 19. Ability to work effectively under pressure, managing conflicting priorities and meeting challenging deadlines  | D                       | ✓           |       | ✓         |                   |
| 20. Ability to work independently to tackle problems, creatively and to think laterally.   | D                       | ✓           |       | ✓         |                   |
| 21. Willingness to keep up to date on relevant policy and procedures in line with the duties identified in the job description and any other educational/trust developments. | D                       | ✓           |       | ✓         |                   |
| 22. Ability to draw upon inter-personal skills to build effective business partnerships through a variety of people.   | D                       | ✓           |       | ✓         |                   |
| 23. Ability to maintain strict confidentiality in all matters  | E                       | ✓           |       | ✓         |                   |
| 24. Works effectively alone or in a team   | D                       | ✓           |       | ✓         |                   |
| 25. Good negotiation skills  | E                       | ✓           |       | ✓         |                   |
| 26. Excellent organisational skills  | E                       | ✓           |       | ✓         |                   |
| 27. Effective verbal and written communication skills to suit a variety of audiences   | E                       | ✓           | ✓     | ✓         |                   |
| 28. Able to follow instructions and procedures on own initiative   | E                       | ✓           |       | ✓         |                   |
| 29. Ability to successfully manage initiative for change   | D                       | ✓           | ✓     | ✓         |                   |

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|--|-------------------------|-------------|-------|-----------|-------------------|
| 30. Receptive to new ideas and able to generate them   | E                       | ✓           |       | ✓         |                   |
| 31. Embraces and displays the NEAT values: aspirational, collaborative, inclusive, innovative, has integrity, responsible                        | E                       | ✓           |       | ✓         |                   |
| 32. Flexible and cooperative attitude  | E                       | ✓           |       | ✓         |                   |
| 33. Ability to safeguard and promote the welfare of children   | E                       | ✓           |       | ✓         | ✓                 |
| 34. Ability to use own initiative  | E                       | ✓           |       |           |                   |
| <b>Other</b>   |                         |             |       |           |                   |
| 35. No disclosure about criminal convictions, barring or misconduct that is considered to make the candidate unsuitable for this particular role | E                       | ✓           |       | ✓         | ✓                 |
| 36. No concerns about medical fitness or attendance that is considered to make the candidate unsuitable for this particular role                 | E                       |             |       |           | ✓                 |
| 37. Able and willing to drive a car to go from school to school  | E                       | ✓           |       |           |                   |
| 38. Able and willing to accommodate occasional evening work  | E                       |             |       |           | ✓                 |