

Job Title: Trust Financial Planning & Analysis Assistant

Location: Trust Shared Services – William Lee Centre, Colonel Frank Seely Academy

Salary: The Redhill Academy Trust Pay Scale, Band 8  
£22,287.89 - £24,600.60

Hours of Work: 37 hours per week, 8.00am – 4.00pm (3.30pm on Friday)

Responsible to: Financial Planning & Analysis Manager

Post Objective: **The main purpose of this role is to assist with providing accurate and timely information required to enable financial information to be provided on the financial position of all aspects of the Trust to all stakeholders.**

### **Role Summary:**

The Financial Planning & Analysis Assistant is tasked with supporting the Financial Planning & Analysis Manager (FP&A) by assisting with internal reporting and financial monitoring activity, and all budgeting and forecasting activity across the Trust, with the primary purpose of supporting the achievement of outstanding educational outcomes for the Trust's students.

The primary performance criterion for the role is to work with the FP&A Manager, to provide an excellent first-class financial planning and analysis service to all academies in the Redhill Academy Trust.

The position will assist the FP&A Manager with ensuring accurate and timely internal management reporting, budgeting and forecasting in line with the Trust Accounting Policies and procedures.

The Financial Planning & Analysis Assistant will report directly to the FP&A Manager.

### **Job Purpose**

- Processing of reports and when required, analysis of income and expenditure items to enable the FP&A Manager to provide management reports on a monthly basis to all key stakeholders, including investigation of and reporting of all material variances
- Assist with annual budgeting process across all Academies and other reporting units
- Assist with regular forecasting process and help to prepare management reports to assist in management's financial review, budget monitoring, and decision making
- Assist with the monitoring best value purchase for all supplies and services to ensure the effective use of resources
- Support the FP&A in identifying funding opportunities and preparing bids
- Assist with the capital investment appraisal process, including post investment review

### **Responsibilities:**

- To assist in providing Strategic Financial Support to the FP&A
- Assistance in the provision of accurate and timely financial plans
- To assist in providing monthly management information and KPIs on income, costs & FTE, including ad hoc requests

- Assist on the Annual Budgeting process, inputs onto budget software to be reviewed by FP&A
- Assist in all reporting analysis of Trust wide performance on a weekly, monthly & ad-hoc basis
- Assist with monthly forecasting process
- Assist and provide requested information for the FP&A to analyse on budget and/or forecast variance
- Assist with Cost Driver Analysis and reporting – including monitoring of best value purchase for all supplies and services to ensure the effective use of resources
- Assist with the preparation of monthly / year end reporting/management information packs, including KPIs and narratives
- Assist with the support for capital investment proposals, including all subsequent reporting & analysis of capital spend
- Support the FP&A on the introduction of a Business Planning process, co-ordinating the inputs across the Finance function & wider business to produce a high-quality future Financial Plan
- Help with developing the longer-term modelling of cash flows to support the control of debt & banking
- Assist with bid funding support

#### General

- Liaise with other departments and non-teaching staff over matters relating to Finance and whole-academy issues.
- To uphold and actively support the Trust's policies and procedures.
- Undertake any other duties which might be reasonably regarded as within the responsibilities of the post, subject to the proviso that any changes of a permanent nature shall be incorporated into the job description in specific terms.