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Job Description

Business Unit	School Improvement Limited – Corporate Finance
Job Title	Commercial Finance Analyst
Pay Range	Grade 7
Location	Head Office, Hybrid Working
Primary Purpose of the Job	To ensure the provision of accurate financial planning, forecasting, and commercial analysis that supports sound financial management, informed decision-making, and the long-term sustainability of School Improvement Liverpool.
Directly Responsible to	Corporate Finance Manager – Corporate Finance
Directly Responsible for	Delivering financial planning, forecasting, and commercial insight across cost centres.
Direct Reports	N/A

Role Purpose (Impact & Outcomes)

The Commercial Finance Analyst enables better, faster, and more financially sustainable decisions across the organisation by delivering accurate forecasts, actionable insight, and commercially grounded analysis.

Success in this role is defined by:

- **High forecasting accuracy and reliability**
- **Clear visibility of financial risks and opportunities**
- **Improved financial performance and sustainability of services**
- **Strong financial decision-making capability among managers**

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Key Outcomes & Accountabilities

1. Accurate and Actionable Financial Forecasting

Outcomes:

- Forecasts are robust, evidence-based, and consistently accurate
- Variances are clearly understood, explained, and reduced over time
- Financial planning supports proactive, not reactive decision-making

Accountabilities:

- Deliver end-to-end budgets and forecasts for assigned areas
- Own and continuously improve forecast accuracy
- Identify and explain key drivers of financial performance and variance
- Develop scenario models to inform strategic and operational choices
- Ensure all accounting adjustments (accruals, prepayments, provisions) are accurately reflected in forward-looking forecasts

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2. Clear Insight to Drive Performance

Outcomes:

- Stakeholders understand what is happening financially and why
- Decisions are guided by timely, relevant, and easy-to-understand insight
- Financial risks and opportunities are identified early and acted upon

Accountabilities:

- Deliver high-quality analysis of financial and operational KPIs
- Translate complex financial data into clear, decision-ready insight
- Highlight emerging risks, pressures, and opportunities affecting service delivery
- Provide forward-looking commentary, not just historical reporting

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3. Strong Financial Ownership Across Cost Centres

Outcomes:

- **Managers take greater ownership of financial performance**
- **Forecasts are credible, well-informed, and aligned to operational reality**
- **Financial discipline and accountability are strengthened**

Accountabilities:

- **Act as the trusted finance partner to assigned managers**
- **Deliver clear monthly performance reports with meaningful insight**
- **Facilitate regular, structured performance reviews with stakeholders**
- **Challenge assumptions, spending plans, and forecasts constructively**
- **Ensure financial inputs are accurate, timely, and aligned with system data**
- **Build understanding of financial implications behind decisions**

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4. Reliable, ERP-Driven Insight

Outcomes:

- **Decision-making is based on consistent, trusted data**
- **Manual work is reduced through effective system utilisation**
- **Reporting is efficient, scalable, and accurate**

Accountabilities:

- **Produce reports, dashboards, and analysis directly from ERP systems**
- **Improve use of system functionality to enhance data quality and efficiency**
- **Ensure all analysis is grounded in reliable and consistent data sources**

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5. Commercially Sound Decision Support

Outcomes:

- Investment and service decisions are financially viable and sustainable
- Pricing, costing, and service models are commercially informed
- Leaders understand the financial implications of strategic choices

Accountabilities:

- Provide financial evaluation of new services, initiatives, and changes
- Assess affordability, risk, and long-term sustainability
- Support pricing and income strategy for traded and commissioned services
- Analyse market and performance positioning across cost centres
- Identify trends and performance gaps with commercial implications

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6. Continuous Improvement in Financial Capability

Outcomes:

- Forecasting and reporting processes become more efficient and insightful
- The organisation becomes more financially literate and data-driven
- Finance operates as a strategic partner, not a reporting function

Accountabilities:

- Identify and implement improvements to forecasting and reporting processes
- Enhance the quality and usefulness of financial insight
- Contribute to a more mature, ERP-led finance operating model
- Improve financial understanding across stakeholders through clear communication

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What Success Looks Like (Summary)

- Forecasts are trusted and used to drive decisions
- Managers actively engage with and own their financial performance
- Financial risks are identified early and mitigated
- Data-driven insight replaces retrospective reporting
- The organisation delivers financially sustainable services with confidence

Additional Experience (Desirable Impact Enhancers)

Outcomes:

- More advanced financial insight and modelling capability
- Stronger contribution to strategic and commercial decision-making
- Enhanced ability to influence and support complex financial decisions

Capability Evidence:

- Experience in FP&A or commercially focused finance roles
- Experience supporting business cases, pricing, or income analysis
- Track record of working with and influencing non-financial stakeholders
- Experience developing dashboards / Power BI reporting
- Evidence of and commitment to Continuous Professional Development (CPD)

Qualifications (Baseline Capability Requirements)

Outcomes:

- Strong technical foundation supporting accurate and credible financial work
- Professional standards aligned to best practice in finance

Requirements:

- Degree in Finance, Accounting, Business Administration, or related discipline
- Part-qualified or fully qualified accountant (ACA, ACCA, CIMA)

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It must be understood that every employee has a responsibility to ensure that their work complies with all statutory requirements, SILs Financial Management procedures and with the Standing Orders and Financial Regulations of the City Council and to ensure that all work functions are undertaken in accordance with health and safety legislation.

This job description is not intended to be either prescriptive or exhaustive. It is issued as a framework to outline the main areas of responsibility.

Prepared/Revised by: Corporate Finance Manager & Head of Finance

Date: May 2026

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