

Post Title	Pay Body	Grade	SCP Range	Date
Finance Assistant	NJC	Grade 4	5-6	Apr 2026

Statement of Purpose

Under the direction of the Chief Financial Officer, to support in the day to day management and administration of the Trust's financial administration, such as ordering, invoice processing and cash management.

Support Financial Management

- Support in providing financial management information to the Senior Leaders of the Trust.
- Monitor all accounting procedures and resolve any problems, including the ordering, processing and payment for all goods and services provided to the school; the operation and regular reconciliation of bank accounts; management of cashflows; maintenance of an assets register; and preparation of invoices, collection of fees and other dues, and recovery of bad debts.
- Support the preparation of final accounts and liaise with auditors as required.
- Support the preparation of financial returns for the DfE, and other central and local government agencies within statutory deadlines.
- Maximise income generation within the ethos of the school.
- Be a point of contact with central and other agencies with regard to grant applications, gifts and other donations.

Support for Financial Administration

- Sourcing, ordering, processing and payment of goods and services provided to the Trust
- Investigate and resolve queries relating to deliveries/incomplete orders with departments and suppliers
- Ensuring Supplier details remain accurate and up to date
- Liaise with auditors where appropriate for job role
- Preparation of sales invoices
- Support in the recovery of bad debts.
- Responsible for collecting, sorting and monitoring physical income. Ensuring proper banking of monies.
- Manage the ordering and supply of school resources.
- Support in the monitoring all school trips and activities and ensure appropriate documentation is completed and submitted.
- Collection of fees and other dues. Primarily through management and reconciliation of Parent Pay into PS Financials.
- Assist with the maintenance of asset registers
- Undertake end of year procedures as necessary in accordance with closure of accounts programme.
- To support the Chief Financial Officer to prepare the preliminary annual budget plans.
- Operate relevant equipment/computer applications (e.g. Word, Excel, spreadsheets, PS Financials, Parent Pay and BromCom).
- Maintain stock and supplies, cataloguing and distributing as required.
- Operate CCA "shop" within the school.

Support General Administration

- Undertake general clerical duties as and when necessary e.g. switchboard, reception duties.
- Assist in arrangements and payment of school trips.

Support to School (this list is not exhaustive and should reflect the ethos of the school)

- Promote and safeguard the welfare of children and young persons you are responsible for or come into contact with.
- Be aware of and comply with policies and procedures relating to child protection, health, safety and security, confidentiality and data protection, reporting all concerns to an appropriate person.
- Be aware of, support and ensure equal opportunities for all.
- Contribute to the overall ethos/work/aims of the school.
- Appreciate and support the role of other professionals.
- Attend and participate in relevant meetings as required.
- Participate in training and other learning activities and performance development as required.
- Assist with pupil needs as appropriate during the school day.

Note 1:

The content of this job description will be reviewed with the post holder on an annual basis in line with the School's performance and development review policy. Any significant change in level of accountability that could result in a change to the grade must be discussed with the post holder and the relevant trade union before submitting for re-evaluation.

Person Specification

Role Criteria	Essential	Desirable	Measured By
Qualifications & Training			
Minimum 4 GCSE's including Maths & English at level 4 and above	✓		AF
Level 3 AAT or equivalent qualification in professional studies		✓	AF
Willingness to undertake training as and when required	✓		AF/I
Knowledge & Experience			
Several years' experience working in a finance office environment	✓		AF/I
Financial Administration experience including a invoice processing, ordering and supplier management	✓		AF/I
Able to understand and apply regulations such as included in the Academies Trust Handbook, other financial regulations and Trust Policies		✓	AF/I
Experience of using financial systems and packages	✓		AF/I
Experience of using PS Financials system		✓	AF/I
Experience of working in an academy trust or school environment		✓	AF
Excellent ICT skills, particularly Microsoft packages	✓		AF/I
Practical Skills			
Ability to manage conflicting priorities, individually and as part of a team, to achieve challenging objectives	✓		AF/I
Good organisational skills and able to set own priorities with the ability to plan and develop systems	✓		AF/I
Methodical and detail focussed with the ability to process large amounts of data accurately	✓		AF/I
Listens well and communicates clearly with colleagues on a wide level	✓		AF/I
Works effectively with a broad range of stakeholders and partners	✓		AF/I
To adhere to equal opportunities. Health & Safety, Safeguarding and other school policies	✓		AF/I
Committed to safeguarding and welfare of all pupils	✓		AF/I
Personal Qualities and Attributes			

Role Criteria	Essential	Desirable	Measured By
Reliable, honest and completely trustworthy	✓		I
Has a friendly yet professional and respectful approach which demonstrates support and shows mutual respect	✓		I
Takes responsibility and is accountable for work and actions	✓		I
Committed to the needs of the pupils, parents and other stakeholders and challenge barriers and blocks to providing an effective service	✓		I
Able to use initiative with an inquisitive nature to understand the purpose of workstreams and the ability to self-learn and motivate	✓		I
Demonstrates a “can do” attitude including suggesting solutions, participating, trusting and encouraging others and achieving expectations	✓		AF/I
Is committed to the provision and improvement of quality service provision and adaptable to change	✓		AF/I
Acts with pace and urgency being energetic, enthusiastic and decisive	✓		AF/I
Is committed to the continuous development of self and others by keeping up to date and sharing knowledge, encouraging new ideas, seeking new opportunities and challenges, open to ideas and developing new skills	✓		AF/I

AF - Application form; I - Interview

Note 1:

In addition to the ability to perform the duties of the post, issues relating to safeguarding and promoting the welfare of children will need to be demonstrated these will include:

- ***Motivation to work with children and young people.***
- ***Ability to form and maintain appropriate relationships and personal boundaries with children and young people.***
- ***Emotional resilience in working with challenging behaviours and***
- ***Attitudes to use of authority and maintaining discipline.***