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| **Post Title** | **Pay Body** | **Grade** | **SCP Range** | **Date** |
| **Trust Finance Manager**  **(12 month FTC)** | NJC | Grade 8 | 22-27 | October 2025 |

# Statement of Purpose

Under the direction of the Trust Business Manager, be responsible for the day to day management and administration of the Trust’s financial systems and processes.

# Support Financial Management

* Management and efficient operation of the Trust’s accounting function according to agreed procedures.
* Prepare monthly and annual estimates and regular reports upon income and expenditure, monitor accounts against budgets and produce reports on the financial position of each school within the Trust to the Directors and Governors.
* 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

* Be responsible for the preparation of monthly financial reports, operating on a full accrual basis
* Monthly forecast projections for presentation to the school governors and Trust Directors
* Maintenance of the schools’ contract registers
* To advice the Headteachers and governors on planning the school’s three-year budget planning process annually.
* To support the Trust Business Manager and Headteacher to prepare the preliminary annual budget plans.
* Undertake all the schools accounting systems:
  + Processing payment for all goods and services through the finance system and Trust banking, ensuring data integrity of Trust and supplier bank details
  + Operation and regular reconciliation of bank accounts
  + Preparation and reconciliation of the VAT126 claims
  + Maintenance of assets register
  + Calculation and preparation of sales invoices
  + Collection of fees and other dues
  + Recovery of bad debts
  + Managing school fund or similar budget
  + Be the lead contact of the schools’ cashless systems
* Monitor closely all financial records and tabulations
* Monitor all school trips and ensure appropriate documentation is completed and submitted
* Managing the school lettings arrangements

**Support to Human Resources**

* Administration and management of monthly employee absences and additional hours claims
* Support the administration of employee contractual changes via the Trust’s payroll system ensuring adequate audit trail is kept of all adjustments
* Supporting the Trust Business Manager with employment correspondence including staff salary letters and contracts of employment

# Support General Administration

* Undertake general clerical duties as and when necessary e.g. switchboard, reception duties.

**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 Finance Manager Level 3+

| **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 |
| School business management qualification |  | **** | AF |
| Willingness to undertake training as and when required | **** |  | AF/I |
| **Knowledge & Experience** |  |  |  |
| Several years’ experience working in a finance office environment at an appropriately senior level | **** |  | AF/I |
| Financial Management experience including a strong understanding of accruals, prepayments and deferred income | **** |  | 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 including advanced Excel skills | **** |  | 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 analyse data to recognise anomalies, explain variances and take corrective action | **** |  | 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** |  |  |  |
| 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.***