

## Finance Lead

### Job Description and Person Specification

#### Purpose

The role will involve providing financial oversight and support to partner schools, whilst ensuring that Trust financial processes and procedures are followed. The role will be line managed and supported by the Head of Hub Finance. Although the Finance Lead is part of the Central Team, the Finance Lead will lead the finance function in specific partner schools, as well as providing support to the Central Team.

#### Role Responsibilities

- Preparation and monitoring of partner schools' budgets, analysing variances and reporting to Headteachers, Local Committees and the Head of Hub Finance at the Central Team.
- Supporting with the preparation of monthly management reports and month end reporting. This will involve supporting with processing month end in accordance with Trust procedures, including bank account reconciliations, VAT126 reconciliations and control account reconciliations.
- Prepare payroll each month to include overtime claims.
- Working independently or with the finance staff within the partner schools and the Central Team to ensure efficient processing of financial transactions in accordance with The Trust's Finance Policies and Procedures and the NEXUS Scheme of Delegation.
- Ensuring the timely and accurate processing of accounts payable and accounts receivable transactions for partner schools and the Central Team within approved budget parameters.
- Ensuring all financial administration is completed in a timely manner.
- Developing and implementing efficient and effective financial administration processes in schools.
- Supporting partner schools with financial queries.
- Supporting partner schools in preparation for year-end and during financial audits.
- These duties may be amended from time to time by the line manager in consultation with the post holder.
- To attend suitable training in agreement with the line manager.
- Any other duties commensurate with the grade as appropriate.
- Have a flexible approach to school finances ensuring the school is well resourced and ensure finances are strategically monitored.
- To action and upload delivery notes, BACS runs and maintenance of the financial database.
- To undertake duties in the school office to ensure tasks are completed in accordance with DfE returns and at the direction of the Headteacher.
- Ensure all visitors and telephone enquiries to the school are dealt with in accordance with school standards and procedures required.
- Maintain the photocopiers.
- Assist with daily deliveries.

## Wider Professional Responsibilities

- Because of the nature of the post, candidates are not entitled to withhold information regarding convictions by virtue of the Rehabilitation of Offenders Act 1974 (Exemptions) Order 1975 as amended. Employees are required to give details of any convictions on their application form and are expected to disclose such information at the appointed interview.
- Because the post allows access to children, candidates are required to comply with The Trust's procedures in relation to police checks and to show a commitment to ensuring that children and young people learn in a safe environment.
- Provide the specified standard and level of service that is expected, noting and passing on any shortfalls or potential improvements.
- Maintain high professional standards of attendance, punctuality, appearance, conduct and positive courteous relations with pupils, parents/carers and colleagues.
- Ensure implementation of The Trust's equal opportunities policies and its statutory responsibility with regard to other individuals and service delivery.
- Participate in relevant and appropriate training and development as required.

## Method of Working

Communitas Education Trust expects all staff to work effectively and co-operatively as part of a team, delivering high quality support. This requires working with people politely and tactfully and in accordance with the Trust's policies and procedures.

Considerable importance is attached to the public relations aspect of our work. Members of the Central Team should project a positive image of the Trust at all times and through all activity.

**Finance Lead**  
**Person Specification**

Section	Information	Essential / Desirable	How Identified
<b>Education and Training</b>			
Formal qualifications and relevant training	Part Qualified Accountant or equivalent	<b>D</b>	Application Form Interview Task Documentary Evidence References
	Qualified Accountant	<b>D</b>	
	Five GCSE passes including English and Maths (Grade C or above) or equivalent level 2 qualification	<b>E</b>	
<b>Experience</b>			
Ability to undertake duties of the post	Experience in an accountancy / finance office	<b>D</b>	Application Form Interview Interview Task
	Experience providing excellent customer service	<b>E</b>	
	Experience in managing budgets, accounts payable, VAT submissions	<b>E</b>	
	Experience maintaining an accounts system and processing day-to-day transactions	<b>E</b>	
<b>General and Specialist Knowledge</b>			
Includes abilities and intellect	Experience in education finance (funding requirements, budget monitoring, sector challenges). Knowledge of the requirements of the ESFA Academies Financial Handbook	<b>D</b>	Application Form Interview Interview Task
	Extensive knowledge of Microsoft Office software, especially Excel	<b>E</b>	
	Experience across primary school settings	<b>E</b>	
<b>Personal Qualities</b>			
Includes any specific physical requirements of the post - (subject to the provisions of the DDA Act)	Excellent communication skills	<b>E</b>	Application Form Interview
	Proactive and forward thinking	<b>E</b>	
	Ability to work as a team member and use own initiative and with minimum supervision	<b>E</b>	
	Rigorous and methodical with the ability to manage own workload and meet deadlines	<b>E</b>	
	Structured and organised	<b>E</b>	
	Confident in providing training, advice and support to colleagues	<b>E</b>	

<b>Suitability to work with children, young people and vulnerable adults</b>			
Safeguarding and promoting the welfare of children, young people and vulnerable adults	Satisfactory DBS disclosure to work in an environment dealing with young people	<b>E</b>	DBS Disclosure Interview References
	Ability to form and maintain appropriate relationships and personal boundaries with children, young people and vulnerable adults	<b>E</b>	
	A commitment to safeguarding and promoting welfare for all	<b>E</b>	
<b>Additional Requirements</b>			
	Operate with the highest standards of personal / professional conduct and integrity	<b>E</b>	Interview
	Willing to work flexibly in accordance with policies and procedures to meet the operational needs of the Trust	<b>E</b>	
	Willing to undertake training and continuous professional development in connection with the post	<b>E</b>	
	Willing to work in accordance with the Trust's values and behaviours	<b>E</b>	
	Full UK driving licence and access to own vehicle and willingness to travel to partner schools	<b>D</b>	
	Able to demonstrate sound understanding of equality / diversity in the workplace and of own non-discriminatory practice and attitude	<b>E</b>	