

Finance Officer

Broadleaf Partnership Trust



Title of Post	Finance Officer
Status	36.5 hours per week, term time plus 2 weeks
Salary/Grade	Grade 3 (NJC 9 –22) - Actual salary £25,133 - £31,077
Location	Head Office, Sutton Coldfield (with travel to Trust schools)
Start date	September 2026
Advert Closing Date	31st May 2026

Job Description

The Role

The Finance Officer is responsible for providing specialist financial support, to the schools for which they have direct responsibility, whilst working as part of the wider finance team to ensure that all Trust schools and directorates receive a high-quality service. The post holder will work closely with the Finance Manager to also ensure the Trust's financial processes are followed, in line with the financial policies of Broadleaf Partnership Trust and the DfE Academy Trust Handbook.

Duties and Responsibilities:

- To ensure purchase orders are reviewed and issued promptly on behalf of schools and to work with schools to ensure the effective receipt of any goods and services ordered.
- To ensure the prompt and accurate processing of supplier invoices and to work with suppliers and schools, to resolve any invoice related queries.
- To check the monthly payroll, liaising with the HR team regarding any queries, in readiness for the payroll approval and processing the relevant payroll journals once it has been authorised.
- To assist with the monitoring of the finance helpdesk and promptly resolve financial queries received via helpdesk.
- To issue sales invoices to third parties, as required and ensure payment is received within a specified timescale and adhering to the Trust's debt procedures policy.
- To ensure the prompt and accurate recording of income received through the bank on the finance system (Xero).
- To ensure the Trust payment card purchases are up to date for month-end in readiness for reconciliation of the credit card statement by the Finance Manager.

- To ensure that month and year-end procedures are completed for their schools, in line with the team's month and year-end timetables.
- To review trip costings provided by schools and where appropriate, support schools with the setting up of trip and other payment items on parental payment systems (Arbor Pay and Parent Pay).
- To understand the Trust's financial procedures and systems, promote adherence to them and train non-finance staff in their use.
- To ensure the timely provision of financial information to the Finance Manager, Head Teachers, and other school-based staff.
- To promote the attainment of value for money amongst budget holders and other Trust staff.
- To update, in a timely manner spreadsheets/online forms such as Pupil Premium, CIC, 16-19 Bursary, SEN and Free School Meals etc, maintained by the finance team.
- To maintain and update the Trust's contract register, include the checking of contract values and lengths and advising the Finance Manager of any discrepancies.
- To keep abreast of current financial and educational developments, undertake relevant CPD where appropriate and work with the other members of the finance team in pursuit of continuous improvement and sharing best practice.

Additional conditions:

- All staff have a responsibility for promoting and safeguarding the welfare of children and young people.
- All staff have a responsibility to ensure tasks are carried out with due regard to Health and Safety.
- To undertake appropriate professional development, including adhering to the principle of performance management.
- To promote the vision and aims of the Trust.
- To set an example of personal integrity and professionalism.
- To attend appropriate staff meetings, training days, and CPD sessions.
- To be an effective team player and support the functions of the Trust.
- To take responsibility for becoming familiar with Trust policies and abide by them.
- Any other responsibilities as commensurate with the role and grade.

Person Specification

Attributes	Essential	Desirable	How Assessed
Relevant Experience	Experience of working (within the last two years) in financial administration	Experience of working in schools or education finance.	AF
	Experience of a range of administrative and technical duties, including invoice processing, data input, retrieval, issuing of reports, payroll checking & account reconciliation etc.	Recent experience of payroll administration and review.	AF
	Experience of working in a busy and demanding environment		AF
Skills & Abilities	A sound knowledge/use of a range of computer applications including financial management systems e.g. Xero, ApprovalMax and Arbor and Excel, Word and SharePoint	A sound knowledge/use Xero, ApprovalMax, Arbor & strong Excel skills.	AF/I
	Ability to identify work priorities and manage own workload to meet deadlines whilst ensuring lower priority work is kept up to date.		AF/I
	Ability to work as a member of a team and work on own initiative.		AF/I
	Good verbal and non-verbal communications skills.		I
	Have a sense of proportion and humour and generosity of spirit		I
	Willingness to participate in further training and development opportunities by the school.		I
	Ability to solve problems and identify anomalies in systems and procedures and take steps to rectify them.		AF/I
Qualifications	3 A – C GCSE passes including Maths and English	<i>Qualification in accounting – AAT technician or equivalent</i>	AF

We are committed to safeguarding and promoting the welfare of children and young people and expect all staff and volunteers to share this commitment. Successful candidates will be subject to an enhanced DBS check.

We reserve the right to close the advert early if a strong field of applicants is received prior to the closing date.

We are committed to equality and value diversity, and therefore particularly welcome applications from under-represented groups.

This post is covered by Part 7 of the Immigration Act (2016) and therefore the ability to speak fluent and spoken English is an essential requirement for this role.

This post is exempt from the Rehabilitation of Offenders Act 1974 and the amendments to the Exceptions Order 1975, 2013 and 2020, which means certain

