



**St Gabriel**

**the Archangel**

**Catholic Multi-Academy Trust**

## Purchasing & Income Officer

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### Job Description

*Forming Christ-centred pilgrims of hope, with kind hearts,  
questioning minds, a thirst for knowledge and a hunger for justice.*

# St Gabriel the Archangel Catholic Multi-Academy Trust

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## Purpose of the Role

The role is responsible for delivering high-quality transactional finance services across the Trust, covering both purchasing and income processing activities.

The role focuses on the accurate and timely processing of purchase orders and a wide range of income streams across academies and central services. It ensures that all transactions are fully supported, correctly coded, and compliant with Trust policies, providing a strong foundation for financial control and reporting.

Reporting to the Senior Financial Accountant, the postholder supports Trust-wide financial control activity by maintaining high-quality purchasing records, supporting academies and central teams with procurement processes, and contributing to strong data quality and compliance within the Finance Shared Services operating model.

Reporting to the Senior Financial Accountant, the postholder also provides day-to-day supervision and support to the Purchasing & Income Assistant, ensuring work is allocated effectively, completed to a high standard, and aligned with agreed processes.

## Key Responsibilities

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### Core accountabilities

- Deliver accurate and timely transactional processing across purchasing and income.
- Ensure all transactions are complete, correctly coded, and appropriately authorised.
- Maintain high standards of data quality across supplier, customer, and financial records.
- Provide responsive and practical support to academies and central teams.
- Maintain clear documentation and audit trails to support financial control and audit.
- Contribute to the development of a standardised, efficient shared services model.

## **Specific responsibilities**

### **Purchasing operations and support**

- Raise purchase orders accurately and promptly within the finance system, ensuring correct coding, approvals, and compliance with delegated authorities.
- Support academies and central teams with purchasing queries, including requisitions, coding, and supplier setup.
- Maintain complete and accurate purchasing documentation, ensuring clear audit trails.
- Liaise with Accounts Payable colleagues to support efficient invoice matching and processing.
- Ensure purchasing activity aligns with Trust procurement procedures, approved suppliers, and frameworks.
- Identify and escalate non-compliant or unusual purchasing activity.
- Liaise with the Chief Operating and Infrastructure Officer and their team to ensure purchase orders align with Trust-wide procurement procedures, preferred suppliers and approved frameworks, supporting value for money, compliance with financial regulations and consistent application of procurement controls. Proactively challenge non-compliant requests and escalate exceptions as appropriate.

### **Income Processing (Order-to-Cash)**

- Process and record a wide range of income streams across the Trust, including:
  - Non-GAG DfE income
  - Local Authority income (High Needs, LAC, Early Years/Nursery, FSM)
  - Parental income (meals, trips, transport, lettings)
- Childcare voucher income
- Other trading and miscellaneous income
- Raise sales invoices where required, ensuring appropriate supporting documentation and approvals are in place.
- Record and allocate income receipts accurately within the finance system, ensuring correct coding and timely processing.
- Maintain accurate and organised records of income transactions to support audit and financial control.
- Liaise with academies and central teams to obtain required information and resolve routine income-related queries.
- Monitor expected income and highlight missing, delayed, or incomplete information to relevant stakeholders.
- Escalate discrepancies, complex queries, or unusual transactions to the Central Finance team.

### **Data quality, controls and compliance**

- Maintain accurate supplier and customer records, including setup and amendments in line with Trust procedures.

- Apply appropriate verification and fraud prevention checks in supplier and customer onboarding.
- Ensure all transactions comply with Trust financial regulations, policies, and delegated authorities.
- Maintain documentation to support clear audit trails and compliance requirements.
- Identify data quality issues or control weaknesses and escalate appropriately.

### **Systems, shared services and continuous improvement**

- Use finance systems effectively to process purchasing and income transactions.
- Support academies and central teams in following correct financial processes.
- Contribute to the standardisation of purchasing and income procedures across all schools.
- Identify opportunities to improve efficiency, accuracy, and user experience.
- Support implementation of system improvements, new workflows, and process changes.

### **Leadership behaviours**

- Values-led and aligned to the Trust's mission and Catholic ethos.
- Acts with professionalism, integrity and attention to detail.
- Collaborative and solution-focused; builds positive relationships with academies and central teams.
- Takes ownership of responsibilities and delivers to agreed standards.
- Demonstrates an improved mindset and willingness to learn and adapt.

## **Qualifications & Training**

### **Essential**

- AAT Level 3 qualified or working towards (or equivalent experience)
- GCSEs (or equivalent) including English and Mathematics at Grade C/4 or above

### **Desirable**

- AAT Level 4 or studying towards a professional accounting qualification
- Relevant procurement or finance systems training

## **Experience**

### **Essential**

- Experience of working in a transactional finance environment
- Experience of purchasing (procure-to-pay) and/or income processing (order-to-cash)
- Experience of using finance systems for processing transactions
- Experience of working with multiple stakeholders (e.g. departments, schools, or clients)
- Experience of maintaining accurate financial records and audit trails

### **Desirable**

- Experience within the education sector or a multi-site organisation
- Experience within a shared services environment
- Experience supervising or supporting junior staff

## **Knowledge & Skills**

### **Essential**

- Strong understanding of financial processes, controls, and data accuracy
- Good knowledge of purchase ordering and income processing procedures
- Ability to analyse transactional data and identify discrepancies
- Strong IT skills, including Excel and finance systems
- High level of attention to detail and accuracy
- Ability to manage workload, prioritise tasks, and meet deadlines
- Strong communication skills (written and verbal)
- Ability to support and guide colleagues on financial processes

### **Desirable**

- Knowledge of public sector or academy trust financial regulations
- Understanding of procurement frameworks and compliance requirements
- Experience with ERP finance systems (e.g. PS Financials, Access, SAP)

## Personal Attributes & Behaviours

### Essential

- High level of integrity and professionalism
- Proactive and solution-focused approach
- Strong organisational skills and ability to take ownership
- Collaborative and team-oriented
- Commitment to high standards of customer service
- Willingness to challenge non-compliant processes constructively
- Continuous improvement mindset

## Safeguarding Commitment

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St Gabriel the Archangel Catholic Multi-Academy Trust is fully committed to safeguarding and promoting the welfare of children and young people. The Trust expects all staff and volunteers to share this commitment and comply with safer recruitment procedures, including an enhanced DBS check and Children's Barring List check.

### Benefits

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- Opportunities for professional development and CPD tailored to digital leadership
- Participation in Trust-wide initiatives and senior leadership forums
- Supportive and collaborative working environment

Signature of post holder	
Date	