

Job Description

Greensand Support Staff Salary Scale:

Point 19-23

Working hours: 12-15 hours per week
over 42 weeks per annum

Contract type:

Permanent

Reporting to:

Finance Manager/Finance and Operations
Director

Trust Finance Business Partner

Job Purpose

Operational responsibility for the delivery of management accounting information in order to monitor financial performance and aid decision making.

Support the Headteacher and Finance Central team to deliver finance strategies and ensure that the provision of financial information is in line with Trust policies and complies with the Academies Handbook.

Key Accountabilities

- Production of monthly management accounts in line with the Trust reporting timetable
- Completing month end
- Reviewing the monthly management accounts to identify and address any areas of over/underspend
- Monitoring spend on capital projects, ensuring all relevant costs have been capitalised and budgets are closely monitored
- Re-forecasting the annual budget each month to ensure that changes to income and expenditure are captured appropriately and any amendments are approved in line with the Scheme of Financial Delegation
- Supporting the annual budget setting and 3-year forecasting process for Yattendon School ensuring assumptions are sound, prudent and in line with Trust guidelines
- Using financial and non-financial information effectively to benchmark performance
- Provision of information as required by the Finance Manager and Finance and Operations Director to support the completion of DFE financial returns
- Supporting with the preparation of year end working papers for the external audit and accounts
- Supporting with internal audits
- To maximise income generation e.g. external grants, business, sponsorship, funding within the strategic objectives/ethos of the Trust, and acting as point of contact for grant applications
- Provide advice and challenge on school level financial matters to support the budgeting process
- Ensure Management Accounts and budget reports are constructed on a consistent set of assumptions and complies with appropriate legal and regulatory frameworks
- Produce management accounts and end of year information for key reporting at school and Trust level
- Reconcile control accounts, bank accounts and credit cards
- Reconciliation of school trips

- Provide full support to the internal and external audits, including preparation and compilation of audit files
- Support budget holders by providing information on committed expenditure and outstanding invoices
- Identify and secure external funding/grant sources to fund resources and activities not funded by the local authority
- Assist in the management of aged debtor and creditor reports
- Undertake any other activities as reasonably directed which are commensurate with the job grade and purpose

General

- In conjunction with the Central team, ensure financial activity for Yattendon School is processed on a timely and accurate basis
- Ensure all activities are carried out in line with the Trust's Scheme of Financial Delegation and Academies Financial Handbook
- Provide support to the Finance and Operations Director as required
- Participate in all aspects of staff development and actively seek to broaden knowledge and skills relevant to responsibilities
- Take responsibility for your own well-being
- Participate in appropriate induction programmes to support new staff
- Maintain confidentiality and security of personal data at all times ensuring compliance with the Data Protection Act and GDPR
- Contribute to the Trust's culture and development by ensuring that you fulfil your professional responsibilities and are carrying out your duties effectively
- Share good practice across the Trust

Line Management

- The post does not have line management responsibilities, but the post holder may have oversight of school based staff carrying out finance duties.

This job description sets out the duties of the post at the date when it was drawn up, but following consultation with you, may be changed to reflect or anticipate changes in the job which are commensurate with the salary and job title.

The actual dates that the additional three weeks attached to this position will be worked should be agreed following discussion and agreement with the Finance and Operations Director.

This job description may be amended at any time in consultation with the postholder.

All staff have a responsibility to promote and safeguard the welfare of children in line with the Trust's Safeguarding and Child Protection Policies.

Person Specification

Qualifications and Professional Status

Essential

- A recognised accountancy qualification (e.g. CCAB qualified, part-qualified, or AAT Level 4 with significant relevant experience).
- Evidence of ongoing professional development in finance, accounting, or business partnering.
- Previous experience of managing or administering school finance.

Desirable

- Fully qualified accountant (ACA, ACCA, CIMA, CIPFA).
- Finance qualification or training specific to the education sector.

Knowledge and Experience

Essential

- Significant experience in a finance role involving budgeting, forecasting, and financial reporting.
- Proven experience of working as a finance business partner or in a role requiring close financial support to non-finance stakeholders.
- Experience of producing and explaining management accounts, variance analysis, and financial forecasts.
- Strong understanding of financial controls, governance, and compliance.
- Experience of supporting multiple budget holders or cost centres.

Desirable

- Experience within a Multi-Academy Trust, school, or wider public / not-for-profit sector.
- Knowledge of academies' financial framework, including the Academy Trust Handbook.
- Experience of supporting schools through financial recovery or efficiency programmes.
- Experience of long-term financial planning and scenario modelling.

Skills and Abilities

Essential

- Strong analytical skills with the ability to interpret and present complex financial information clearly.
- Excellent communication skills, with the confidence to challenge and influence senior leaders and headteachers.
- Ability to build positive, professional relationships with a wide range of stakeholders.
- Strong organisational skills, with the ability to manage a varied workload and meet deadlines.
- High level of accuracy and attention to detail.
- Competent user of financial systems and Microsoft Excel.

Desirable

- Experience of using education finance systems.
- Ability to deliver financial training or guidance to non-finance staff.
- Advanced Excel or financial modelling skills.

Personal Qualities

Essential

- Professional, credible, and resilient, with a flexible and solution-focused approach.

- Proactive and self-motivated, with the ability to work independently and as part of a Central Team.
- Commitment to the Trust's vision, values, and ethos.
- Willingness to engage directly with schools, understanding their individual contexts and challenges.
- High levels of integrity and discretion.

Practical Requirements

Essential

- Ability and willingness to travel regularly to Trust schools across Surrey and West Sussex.
- Ability to work flexibly to meet the needs of schools and the Central Team.
- Right to work in the UK.

Desirable

- Full UK driving licence and access to a vehicle.