



Trust Finance Officer
Job Description

Job title: Senior Finance Officer

Location: In person, across selected schools within the Trust

Contract type: Full time, all year round (37.5 hours per week), permanent

Full time, 37.5 hours per week, 8.00 – 4.00 daily, permanent – Term Time Plus 3 weeks*

Salary: H9 28 – 31 (Fringe) (£39,152 - £41,771 + £729), term time plus 3 weeks (***Term Time plus the last two weeks of August and one other week of school closure to be agreed**)

PURPOSE OF THE POST

Main purpose:

1. Oversee and manage financial operations across multiple schools within the Trust, ensuring effective financial management, compliance, and robust budget control.
2. To be responsible for assisting with budgets, monitoring, tracking and review and day to day finance procedures of assigned schools ("the Academy" or "Academies") within the St Francis of Assisi Catholic Academy Trust ("the Trust"), which will initially be St Mary's Catholic School, Bishop's Stortford and St Josephs' Catholic Primary School, Bishop's Stortford.
3. To prepare and support schools with monthly management accounts.
4. Ensure financial procedures and policies are implemented consistently and effectively across assigned sites.
5. Deliver accurate financial reporting.
6. To provide the overall strategic and operational leadership and management of the Academies' finances.

N.B. The duties listed below are not an exhaustive list of requirements. The specific nature and balance of these responsibilities will vary according to the needs of the Trust/Academies.

Main duties: In relation to assigned Academies, with the assistance of Chief and Deputy Chief Financial Officers ("CFO" and "DCFO"):

1. Lead, manage and monitor all financial operations for assigned Academies, ensuring compliance with Trust and statutory requirements.
2. Prepare monthly management accounts.
3. Prepare annual budgets, forecasts, and financial plans for each assigned Academy.
4. To be responsible directly to the CFO, DCFO, Headteachers and the Governing Body for all financial and accounting procedures, including: the fixed asset register, reporting and returns, including monthly and annual budget monitoring and annual statement of accounts; including requirements of statutory audits, the DFE, recording income and expenditure under correct ledger heading.
5. To implement and monitor the procedures outlined in the Trust's Financial Regulations document.
6. Monitor expenditure, income, and budgetary control, providing regular updates to Headteachers and Trust leaders.
7. Ensure all financial transactions are processed efficiently and accurately.
8. Produce timely and accurate financial reports for senior leadership and the Governing Board.
9. Liaise with external auditors and ensure audit requirements are met.
10. To develop, implement, monitor and maintain the operation and compliance of financial controls, standards and systems and the Academies resource management self-assessment checklist.
11. To manage staff related financial matters including: pension returns, auto enrolment, new starters, leavers, changes for LGPS & TPS, monitoring of payments of salaries and ensuring that the required returns are completed to deadlines (e.g. superannuation, taxation and NI).
12. To complete necessary financial returns, bids and grant claims ensuring all streams of revenue are fully secured and accounted for.



13. To negotiate, manage and monitor tenders, contracts, licences and service level agreements to ensure effective and high quality delivery of services to the Trust and value for money.
14. To monitor capital expenditure and ensure it is reported appropriately.
15. To ensure the Academies' insurance cover is up to date and effective.
16. Authorisation of expenses and payments including: invoices, accounts receivable and lettings, authorisation of all payments and purchase orders.
17. To act as cost centre manager for specific budget areas and provide regular updates to the Trust staff on financial matters such as budgetary controls.
18. To authorise trip expenditure prior to visits.
19. To oversee services and ensure value for money for parents and a break even for the Academies.
20. To monitor exceptional needs pupils and invoice out of county and Hertfordshire for additional funding.
21. Prepare annual departmental maintenance budgets in accordance with arrangements agreed with Leadership Group and subject leaders.
22. To be available to staff to provide or receive information. To monitor departmental budgets and interpret figures to staff.
23. Travel between sites as required to provide on-site support and oversight.

Other duties: *With the assistance of the CFO and DCFO:*

1. To ensure confidentiality of records and information is maintained.
2. To attend relevant meetings (e.g. Governing Body meetings) as required.

General Duties:

Whole-school organisation, strategy and development:

1. Demonstrate the vision and values of the Academies in everyday work and practice.
2. Contribute to the development, implementation and evaluation of the Academies' policies, practices and procedures.

Health and Safety:

1. Be aware of and comply with policies and procedures relating to child protection, health and safety, confidentiality, security, data protection; and report all concerns to an appropriate person.
2. Promote the safety and wellbeing of pupils.

Working with colleagues and other relevant professionals:

1. Collaborate and work with colleagues and other relevant professionals within and beyond the Academies.
2. Develop effective professional relationships with colleagues.

Management of staff and resources:

1. Direct, supervise and provide support to staff assigned to them.
2. Contribute to the recruitment, selection, appointment and professional development of staff.
3. Monitor quality and standards of resources delegated to them.

Professional development:

1. Take part in the Academies' appraisal procedures.
2. Take part in further training and development in order to improve own performance.
3. Where appropriate, take part in the appraisal and professional development of others.

Communication:

1. Communicate effectively with pupils, parents/carers, colleagues, wider Academies community and Trustees/governors.

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