



THE ATHELSTAN TRUST

Caring, collaborative and excellent



Senior Finance Officer

Information for Applicants



Welcome to the Athelstan Trust.

The Athelstan Trust is a caring, collaborative community of 10 schools across Wiltshire, Gloucestershire and South Gloucestershire. Established in 2015, we have stayed true to our founding values and intent, which is to serve our communities by providing an excellent, inclusive education, every day.

We educate over 5000 pupils in 10 schools with more than 850 staff. Our trust includes 6 secondary schools and 4 primary schools serving a range of communities, from the Forest of Dean to the market towns of Chippenham, Chipping Sodbury, Malmesbury and Tetbury, to rural villages, to the outskirts of Swindon.

Each of our schools maintains its own identity and tailors its offer to meet the needs of the school's community and the children who attend.

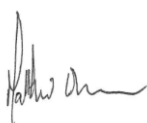
We are absolutely committed to raising educational standards for all the children in our schools. We believe in developing the talents and skills of all our staff and students.

This is an exciting time to join us!

In 2025, The Trust appointed a new Chair of Trustees and CEO. At this moment of change, trustees renewed the vision and plans for the trust and agreed ambitious strategic priorities to reflect its size and ambition. The Athelstan Trust therefore embarks on its second decade with optimism and determination to deliver excellence for every pupil.

As a medium sized trust with over £50m income each year, we are developing our offer to schools and formalising systems and processes to ensure operational effectiveness, value for money, and high-quality central services. Educational excellence begins with high quality professional services which enable school leaders to focus on children, teaching and school culture.

Best wishes,



Matthew Evans

Chief Executive Officer

The Athelstan Trust



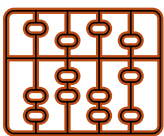
Our Philosophy as an Employer

The Athelstan Trust is absolutely committed to raising educational standards for all the children in our schools. In order to do this, we need to recruit the best staff who are committed to our vision and values.

We aim to be the employer of choice in our area and genuinely believe that all roles in our organisation can be carried out within a flexible working model. Working in schools should be seen as part of a rich fulfilling life and not a barrier to it. We will always consider a flexible working option for every post.

We understand that we need to support staff to achieve our goals and have in place a professional development programme that offers internal and external opportunities to develop the talents and skills of all our staff.

Why work for us?

				
CULTURE Our staff tell us that we are a great employer because we put people first.	FLEXIBILITY We value flexible working because it means happier, fulfilled employees.	DEVELOPMENT People have long and successful careers with opportunities to grow and develop.	SALARY We pay well by industry standards and benchmark against other Trusts.	LOCATION Our schools are geographically close, meaning face-to-face collaboration.

Generous pension scheme with the LGPS

Enhanced Employee assistance programme

Flexible working opportunities and a genuine commitment to family and work/life balance

Automatic enrolment to the teacher or local government pension schemes

Generous holiday allowance for support staff

Recognition of local government continuous service

Cycle to Work scheme

Free will writing service



Rehabilitation of Offenders Act 1974. Applicants must, therefore, disclose all spent and unspent convictions.

References

References will be sought for shortlisted candidates before interview. Please also be aware that you will be subject to an online check (see information below) and that you may be questioned about the findings of such a check at your interview.

Flexible working and equality

We are a flexible working employer and are open to requests for working arrangements which make this post manageable to suitable candidates. We are happy to make any reasonable adjustments you require during your interview also, so please ask us.

Further information

Candidates who would like to talk about this opportunity are invited to contact Dani Gregory by email dgregory@theathelstantrust.org



Job Description: Senior Finance Officer

Key Responsibilities

1. Core Financial Duties

- To ensure timely and consistent posting to the accounting system.
- To prepare information, complete templates and upload documentation as required by the trust and central finance team.
- To manage expenditure through procurement card in line with Trust Procedures and process the procurement card journal to the accounting system.
- To process other journal entries to the accounting systems as required.
- To provide cover for absent finance staff as required.
- To develop and maintain up to date knowledge and understanding of all aspects of educational funding.

2. Trip Administration

- Ensure that trips are agreed and set up in a timely manner.
- Oversee the administration of trips, ensuring income and expenditure is recorded accurately.
- Liaise with central team regarding need for trip spend via Caxton, providing reconciliations to evidence funds available for loading, throughout where needed.
- Provide final reconciliation of trips once they are completed to Finance Business Partner.
- Administer trip refunds where appropriate.

3. SEND Finance Administration

- Update and reconcile EHCP income records.
- Maintain Alternative Provision expenditure records and support monitoring activities.
- Liaise with SENDCo to prepare information for sales invoices and update invoicing spreadsheets.
- Liaise with the Local Authority for in year leavers and (if appropriate) download all SEN documentation and transition documents as required, resolving any discrepancies as they arise.
- Assisting Finance Business Partner with SEN income and expenditure for month end accounts.

4. Payroll Administration

- Prepare monthly spreadsheets for overtime and one-off changes, where appropriate.



- Generate and check monthly payroll reports, ensuring they align with HR changes and highlight anomalies.
- Liaising with contact at Payroll provider regarding any queries and issues surrounding monthly payroll.
- Liaising with staff in school with general payroll queries which can be escalated to the central payroll inbox.
- Assist Finance Business Partner with any queries regarding payroll reconciliations and further versions of changes.
- Ensure after completion, payroll pack is approved by headteacher and Finance Business Partner.

5. Purchasing

- Authorise purchase orders and invoices up to £1,000.
- Act as the first point of contact for school purchasing queries and system support.
- Coordinate annual buy back orders and monitor in year training purchases.
- Ensure oversight of Caxton and credit card transactions are approved, input and statements are reviewed monthly.

6. Lettings

- Liaise with the site team regarding availability.
- Provide hirers with costings and required documentation.
- Update lettings invoicing spreadsheets for finance processing if appropriate.

7. Budgeting

- To provide information to Finance Business Partner centrally, to enable the setting of annual and revised budgets.
- Use the agreed budget to actively monitor and control performance to ensure effective use of resources.
- Identify and inform the Finance Business Partner of the causes of significant variances

8. Project Management

- Identify, develop and evolve structures, providers, systems and processes to support your schools alongside the central trust finance team.
- Manage business change projects to improve the existing provision of services.
- Train school-based staff in new ways of working as required.



Person Specification – Senior Finance Officer		
	Essential/ Desirable	How assessed*
QUALIFICATIONS		
To have appropriate financial qualification/s and/or experience of working in a finance function	E	AF/Cert
Evidence of ongoing CPD	E	AF/Cert
KNOWLEDGE, UNDERSTANDING AND EXPERIENCE (UP TO DATE/CURRENT)		
Familiarity with financial processes and procedures, including month-end and year-end	E	AF/IV
Experience of working in a finance function within education or the public sector	D	AF/IV
Ability to develop financial controls and processes in compliance with audit and regulatory requirements, providing guidance to colleagues to support and monitor implementation	D	AF/IV
To demonstrate excellent verbal, organisational and written communication skills	E	AF/IV
High level of IT competence, literacy and numeracy skills, being a proficient MS Excel user Experience of using and supporting others in the use of financial software packages	E	AF/IV
SKILLS, COMPETENCIES AND PROFESSIONAL QUALITIES		
Strong interpersonal skills with ability to build good relationships with colleagues and other professionals	E	AF/IV
Proactive and diligent approach to work, with initiative to prioritise own workload alongside that of the wider team to meet competing deadlines	E	AF/IV
Ability to make recommendations based on the analysis of options	E	AF/IV
Capacity to work under pressure to meet organisational priorities	E	AF/IV
Ability to work flexibly, adopt a 'hands on' approach, and respond to unplanned situations	E	AF/IV



Takes ownership and responsibility for tasks, seeing them through to completion, taking a direct and thorough approach with a willingness to seek specialist advice where needed	E	AF/IV
Flexible in terms of working patterns and evolution of the role, being embracing of change	E	AF/IV
Full clean driving licence.	E	AF

***Key to how skills are assessed: AF = Skill assessed via application form. IV = Skill assessed via interview.**

Cert = Certificate checked at interview

