Job Profile

Job Details	
Job title	Head of Financial Control, Management Accounting and Payroll
School/Trust	Lion Academy Trust (LAT)
Responsible to	Chief Finance and Risk Officer
Line management	Two Deputy Financial Controllers, outsourced finance functions, and other finance / payroll / systems colleagues as required
Location	London - Trust Central Team, with regular work across academies as required
Salary	Principal Officer 10 (PO10, Outer London, scale point 53 £68,784 to scale point 56 £72,399 pending April 2026 NJC pay award/inflation negotiations outcome)
Pension	Local Government Pension Scheme eligible (https://www.lgpsmember.org/)
Contract Type	Permanent, full-time, 52 weeks per year
Start date	From 1st September 2026, subject to successful candidate availability

Main purposes of the job

At Lion Academy Trust we take pride in providing an outstanding environment for all pupils so that they can succeed in their academic and general development. The Head of Financial Control, Management Accounting and Payroll is a senior finance leadership role responsible for ensuring that the Trust has a strong, reliable and well-evidenced financial control environment, accurate management accounting, effective payroll and pension assurance, and high-quality financial insight that supports educational outcomes across all schools.

The postholder will lead and line manage two Deputy Financial Controllers, setting clear standards, allocating portfolios and ensuring the successful delivery of monthly finance cycles, control checks, payroll assurance, audit evidence, management information, funding analysis, financial systems and Trust finance priorities. The role will also provide leadership as required of outsourced finance functions, including Payroll, Accounts Payable, and Internal Audit. The role must lead through others, while remaining sufficiently technically strong to test, challenge and improve the work produced.

The role will support the Chief Finance and Risk Officer by translating Trust priorities into deliverable finance work programmes, ensuring that financial health, reserves, forecasting, funding, cost control and value for money are actively managed. Annual objectives and KPIs will change over time, but the postholder will remain accountable for ensuring that finance work is planned, evidenced, delivered and reported with professional discipline.

This role is for a qualified accountant and experienced management accounting leader who is an expert with relevant tools, such as Excel and other finance systems/packages, and confident in interrogating financial, payroll, and school operational data. The successful candidate will be values-led in a practical public-service sense: honest with the numbers, careful with public money, respectful in challenge, calm under pressure and focused on enabling schools to use resources well for pupils.

Key relationships

Internal	Chief Finance and Risk Officer; Chief Executive Officer; Executive Team; Heads of School; school senior leaders; Deputy Financial Controllers; finance, payroll, HR, operations, estates, ICT and governance colleagues; budget holders and school office teams.
External	Internal and external auditors; Department for Education; HMRC; Teachers' Pension Scheme; Local Government Pension Scheme administrators; local authorities; banking, payroll, finance-system and other third-party providers; legal and professional advisors where relevant.

Role leadership expectations

- Provide visible, calm and credible leadership for the Trust finance control, management accounting and payroll assurance functions.
- Line manages the two Deputy Financial Controllers, ensuring that their portfolios, annual objectives, delegated controls and success measures are clear, documented and reviewed regularly.
- Lead the monthly finance operating cycle, including reporting deadlines, deputy review meetings, forecast review, payroll assurance, control sign-off, risk escalation and follow-up of actions.
- Ensure the Trust has a single, reliable version of financial truth across budgets, forecasts, reserves, staffing costs, payroll, funding, income, cashflow, balance sheet and school-level reporting.
- Build a finance culture that is accurate, service-focused, professionally curious and prepared to challenge poor data, weak controls or unevidenced assumptions.
- Support school leaders and central teams to make good resource decisions that protect educational quality, statutory compliance, safeguarding and long-term financial sustainability.

Annual Trust priorities

The postholder will be expected to deliver the finance elements of Trust priorities and annual KPIs. Current examples include reserves, forecasting accuracy, high-risk spend scrutiny, SEND tracking, income maximisation, pupil-number and nursery-capacity financial modelling, per-pupil cost analysis, capital affordability and audit assurance. These will be refreshed annually and should be converted into clear objectives for the postholder and Deputy Financial Controllers.

General Responsibilities

1. Leadership, line management and finance team development

- Directly line manage the two Deputy Financial Controllers, including regular one-to-ones, objective setting, performance review, development planning, prioritisation, coaching and accountability for delivery.
- Agree clear portfolios for each Deputy Financial Controller, ensuring coverage of management accounting, income tracking, SEND/EYFS/nursery analysis, procurement and supplier controls, payroll assurance, accounts payable/receivable, VAT, reconciliations and school-facing finance support.
- Review and quality-assure the work of Deputy Financial Controllers, ensuring that management information, control evidence, reconciliations, forecasts and committee reporting are accurate, timely and professionally presented.
- Lead the finance team operating calendar, ensuring that month-end, payroll, management accounts, forecast updates, audit, budget setting, statutory returns and Trust-priority reporting are properly planned and resourced.
- Develop finance colleagues by improving training, written procedures, system guidance, cross-cover, resilience and succession planning across the finance function.
- Ensure service standards are clear and maintained with schools and internal stakeholders, including response times, quality of advice, consistency of process and professional customer service.

2. Delivery of Trust priorities and financial health

- Lead the finance work programme that supports the Trust priority for strong and sustainable financial management, maintenance of reserves, optimisation of resources and long-term educational sustainability.
- Translate annual Trust finance priorities into a deliverable plan, identifying owners, milestones, reporting points, evidence requirements, risks and dependencies.
- Hold the Deputy Financial Controllers to account for their delegated elements of Trust priorities, while retaining overall leadership accountability for the quality, timeliness and impact of finance delivery.
- Ensure accurate forecasting, early escalation and documented intervention where schools, regions or Trust-level budgets show pressure, deteriorating reserves or material variance from plan.
- Ensure management accounts and finance meetings include active review of reserves, forecast confidence, school-level risks, recovery plans, volatile income streams, high-risk spend and the impact of agreed interventions.
- Provide clear financial analysis to support decisions on pupil numbers, staffing structures, SEND provision, nursery and wraparound services, capital investment, procurement, operational efficiency and income growth.
- Ensure that financial reporting makes explicit the link between financial sustainability and the Trust's ability to protect educational quality and outcomes for pupils.

3. Supporting educational outcomes through financial stewardship

- Work with the Chief Finance and Risk Officer, Executive Team, school leaders and budget holders to ensure resources are aligned to school improvement priorities, pupil attainment, safeguarding, inclusion, SEND provision and statutory compliance.
- Provide evidence-based financial advice that helps leaders balance affordability, educational impact, value for money and operational risk.
- Support leaders to understand the financial implications of curriculum decisions, staffing structures, pupil-number trends, SEND pressures, nursery and extended-service operations and capital priorities.

- Ensure that financial challenge is constructive, proportionate and focused on the best use of resources for pupils and schools.
- Develop finance reporting that helps non-finance leaders understand what has happened, why it has happened, what risks it creates and what action is required.

4. Management accounting, budgets, forecasting and reserves

- Lead and deliver Trust-wide management accounting cycle, including annual budgets, multi-year budgets, monthly management accounts production and reviews, in-year forecasting, variance analysis, cashflow forecasting and reserves reporting.
- Ensure monthly management accounts are accurate, complete and issued to agreed deadlines, with clear commentary on income, expenditure, staffing, restricted funds, reserves, cashflow, balance sheet and key risks holding meetings with key internal leads at each school to review and validate assumptions.
- Deliver detailed budget-setting and re-forecasting processes across the Trust, ensuring assumptions are evidence-based, version-controlled and agreed with relevant school and central leaders.
- Ensure forecasts are actively managed and updated for pupil numbers, grants, staffing changes, pay awards, agency spend, SEND funding, nursery and wraparound income, catering, lettings, premises costs, capital and other material movements.
- Develop and monitor recovery or mitigation plans where schools project deficits, reserves deterioration or significant in-year variance.
- Maintain a clear Trust reserves model, including free reserves, restricted funds, school-level reserves, cashflow implications and confidence levels in achieving Trust targets.
- Prepare clear reports and recommendations for the Chief Finance and Risk Officer, Executive Team, Finance and Resources Committee, Board and other governance forums as required.

5. Financial control environment and governance

- Own and continuously improve the Trust financial control environment, ensuring that controls are designed, documented, implemented, tested and evidenced across all relevant finance processes.
- Ensure systems and procedures operate in accordance with the Trust's financial policies, scheme of delegation, procurement rules, delegated authorities, Academy Trust Handbook, funding agreements and relevant statutory requirements.
- Maintain and monitor controls over purchase orders, invoices, supplier amendments, payments, journals, payroll changes, bank transactions, credit cards, income, debt, VAT, fixed assets, restricted funds and balance sheet reconciliations.
- Ensure segregation of duties, approval workflows, system access permissions, audit trails and exception reporting are appropriate, reviewed and corrected where weaknesses are identified.
- Implement monthly control sign-off arrangements, including bank, VAT, payroll, debtors, creditors, control accounts, fixed assets, inter-school or central balances and restricted funds.
- Investigate control failures, policy breaches, unusual transactions or unexplained variances, ensuring corrective action, lessons learned and escalation to the Chief Finance and Risk Officer where required.
- Support maintenance of the Trust risk register, particularly in relation to financial sustainability, payroll, systems, fraud risk, data integrity, reserves, income, procurement, audit and compliance.

6. Internal audit, external audit and assurance

- Lead the operational delivery of internal audit and internal scrutiny, working with the Chief Finance and Risk Officer, internal auditors and relevant leaders delivering to timetable, evidence requirements and management responses.
- Coordinate evidence collection, walkthroughs, sample testing, audit fieldwork, responses to queries and follow-up of internal audit actions across finance, payroll, procurement, income, systems and controls.
- Maintain an audit action tracker, ensuring that recommendations are owned, delivered, evidenced and reported to the appropriate governance forum.
- Support the annual accounts and external audit process by ensuring that working papers, reconciliations, payroll evidence, pension evidence, grant records, control documentation and management responses are complete and timely.
- Lead the preparation and coordination of relevant payroll and pension audits, including Teachers' Pension Scheme, Local Government Pension Scheme, HMRC, payroll controls, staff disclosures and year-end reconciliation requirements.
- Ensure the Trust is always audit-ready, with finance records, reconciliations, policies, approval evidence and supporting documentation maintained to a high standard throughout the year.
- Use audit findings to strengthen procedures, train colleagues, improve systems and reduce recurrence of control weaknesses.

7. Payroll, pensions and staffing-cost assurance

- Lead the monthly payroll assurance process, ensuring that payroll is accurate, properly authorised, reconciled, correctly coded and supported by robust exception reporting.

- Work closely with HR, school offices, school leaders and external payroll providers to ensure starters, leavers, contract changes, allowances, pay awards, deductions, overtime, salary sacrifice, statutory payments and pension changes are processed accurately.
- Ensure monthly payroll sign-off processes are completed by schools and central teams, with changes reconciled to contracts, HR records, budget assumptions and staffing structures, acting as final sign-off on behalf of the Trust.
- Review payroll journals, payroll reconciliations, staffing-cost forecasts and budget variances, ensuring material movements are explained and corrected promptly.
- Maintain strong oversight of Teachers' Pension Scheme, Local Government Pension Scheme, HMRC, PAYE, National Insurance, Apprenticeship Levy, automatic enrolment and other payroll-related obligations.
- Monitor the performance of payroll, pension and related third-party providers, ensuring service issues, errors and compliance risks are escalated and resolved.
- Ensure payroll, pension and staff-cost information is handled securely and confidentially, with appropriate controls over sensitive personal data.
- Ensure relevant Office of National Statistics returns regarding pay/payroll are completed accurately.

8. Financial systems, data analysis and reporting improvement

- Act as a senior finance systems and data lead for the Trust, ensuring that finance-system structures, coding, reporting hierarchies, workflows, permissions and data integrity support strong management information and control.
- Use advanced Excel, PowerBI, and other data tools to extract, cleanse, reconcile, analyse and present finance, payroll and school-operational data.
- Develop controlled Excel models, dashboards, templates and reporting packs that are accurate, version-controlled, documented and capable of being reviewed by others.
- Interrogate financial systems and source data to identify coding issues, missing income, duplicate payments, unusual transactions, budget misalignment, payroll anomalies and inconsistent reporting.
- Lead improvements in the use of Iris/PS Financials or equivalent systems, including user training, reporting design, workflow improvement, access control and adoption of common processes across schools.
- Develop reporting that improves early warning, decision-making and accountability for reserves, forecasting, pupil numbers, SEND, income, agency costs, nursery/wraparound activity, procurement and capital commitments.

9. Income, funding, SEND, pupil numbers and cost recovery

- Lead or coordinate finance analysis that supports maximisation, protection and recovery of income, including GAG, pupil premium, SEND/EHCP top-up, EYFS/nursery funding, school meals, grants, lettings, wraparound and other restricted or controllable income.
- Ensure monthly review of SEND financial pressures alongside budget monitoring, including EHCP-related income, staffing costs, agency costs, unfunded provision, top-up funding, backdated funding and projected year-end variance.
- Ensure pupil number, nursery occupancy, reception applications and wraparound-service data are used to inform financial forecasts, staffing affordability, contribution analysis and school-level sustainability planning.
- Work with school and operational leaders to identify missed income, underclaiming, incorrect coding, debt issues, funding risks and opportunities for recovery or challenge.
- Ensure management accounts and finance reports include clear analysis of volatile income streams, risks, actions taken and measurable impact.

10. Procurement, value for money and cost control

- Lead finance scrutiny of high-risk discretionary spend, including agency, staffing changes, consultancy, premises, contracts, non-contract expenditure, capital commitments and other material areas before commitment where required.
- Support Trust-wide and regional procurement activity by providing financial analysis, baseline cost data, savings evidence, affordability assessment and value-for-money challenge.
- Ensure supplier management, contract costs, invoice automation, purchase-to-pay processes and expenditure controls operate effectively and comply with Trust policy and relevant legislation.
- Work with operations, HR and other support functions to evidence efficiencies and ensure cost reductions do not compromise quality, safeguarding, statutory compliance, school operations or educational outcomes.
- Report savings, cost avoidance, risks to delivery and impact on schools to the Chief Finance and Risk Officer, Executive Team and committees as required.

11. Capital, strategic investment, growth and project delivery

- Support the development of medium-term and long-term strategic investment plans, ensuring affordability, reserves, cashflow, risk reduction, educational impact and value for money are assessed clearly.
- Provide financial modelling and scenario analysis for strategic investment, estates, ICT, capital projects, compliance works, revenue pressures and Trust growth.
- Ensure capital spend is monitored against approved budget, committed spend, actual spend, forecast outturn, procurement route, expected benefits and affordability.
- Lead finance workstreams for Trust-wide projects, including systems projects, financial integration, banking changes, reporting improvements, bids, business cases and process redesign.

- Support due diligence and financial integration of new schools joining the Trust, including review of finance, payroll, HR, estates and contractual information with relevant specialists.
- Maintain project documentation, financial risks, issues logs, action plans and reporting where finance is leading or supporting project delivery.

12. Safeguarding, confidentiality and professional standards

- Promote and safeguard the welfare of pupils and young people and comply with all Trust safeguarding policies, safer recruitment expectations and statutory requirements.
- Act with integrity, objectivity, discretion and accountability in the stewardship of public money.
- Maintain confidentiality and data protection compliance when handling payroll, staffing, pupil and financial information.
- Communicate in clear, accurate and professional English, both verbally and in writing, including Board-level reports, policies, procedures and guidance for non-finance colleagues.
- Model the Trust's values in a practical and non-political way: high standards, honesty, service, respectful challenge, fairness, accountability and commitment to pupils and schools.
- Undertake any other reasonable duties commensurate with the level, purpose and grading of the post.

Indicative Performance Measures

Performance measures will be agreed with the successful candidate and refreshed annually. They are likely to include the following areas:

Area	Indicative measure	Evidence of success
Financial health	Accurate forecasting, active reserves management, early escalation and documented interventions where school or Trust positions are at risk.	Management accounts, forecast accuracy review, reserves reporting, recovery plans, Executive and committee reports.
Trust priorities	Finance elements of annual Trust priorities delivered through clear objectives, owners, timelines and evidence of impact.	Annual delivery plan, KPI tracker, Deputy Financial Controller objectives, action logs and governance reporting.
Control environment	Financial controls are documented, followed, tested and improved, with weaknesses corrected promptly.	Control checklists, sign-offs, reconciliations, exception reports, policy updates and audit findings.
Audit and assurance	Internal audit, external audit, payroll audit and pension audit work is planned, evidenced and completed to timetable.	Audit scopes, evidence packs, working papers, management responses and action tracker.
Payroll and pensions	Payroll and pension processes are accurate, reconciled, authorised, timely and compliant.	Monthly payroll sign-off, exception reporting, provider reviews, pension submissions and reconciliations.
Management information	Reports are accurate, timely, insightful and useful to non-finance leaders and trustees.	Management account packs, dashboards, committee papers, meeting minutes, user feedback and action logs.
Team leadership	Deputy Financial Controllers and finance colleagues have clear responsibilities, strong performance standards and effective development.	One-to-ones, objectives, appraisal evidence, cross-training, service measures and quality reviews.
Educational impact	Financial advice supports sustainable school improvement, resource allocation and protection of quality for pupils.	School-level financial plans, staffing reviews, SEND analysis, pupil-number modelling and impact commentary.

This job description is representative only. Other reasonable duties may be allocated from time to time, commensurate with the general character of this post and its grading. There will be a periodic review of the role and responsibilities in line with the emerging priorities of Lion Academy Trust.

Person Specification

This table lists the essential and desirable requirements needed in order to perform the job effectively. Candidates will be shortlisted based on the extent to which they meet these requirements.

Essential: requirements without which the job could not be done. Desirable: requirements that would enable the candidate to perform the job well. Evidence: A = application form, I = interview, T = technical / written task, R = reference, C = certificate or professional membership check.

Qualifications and Professional Development

Criteria	Essential	Desirable	Evidence
Qualified accountant with a recognised professional qualification such as CIMA, ACCA, CIPFA, ICAEW/ACA, ICAS or equivalent recognised accountancy qualification.	X		A, C
Current membership, or eligibility for membership, of a relevant professional body and evidence of continuing professional development.	X		A, C
Educated to degree level, or able to demonstrate an equivalent level of knowledge, analytical capability and professional experience, with excellent numeracy and literacy skills.	X		A
Highly effective written and spoken English, including ability to write clear Board-level papers, policies, procedures and communications for non-finance colleagues.	X		A, I, T
Advanced Excel, data analytics, Power Query, Power Pivot, Power BI, systems or report-writing training.	X		A, T
Payroll, pensions, CIPP, school business management, project management or other relevant specialist qualification.		X	A, C
PRINCE2, Agile, project management or equivalent practical project leadership experience.		X	A, I

Experience

Criteria	Essential	Desirable	Evidence
Significant experience in a senior management accounting, financial control or finance leadership role.	X		A, I, R
Experience leading annual budget setting, monthly management accounts, multi-year forecasting, variance analysis, cashflow reporting, reserves reporting and balance sheet review.	X		A, I, T
Experience line managing, developing or coordinating finance staff, including setting objectives, reviewing work, giving feedback and holding colleagues to account.	X		A, I, R
Experience owning or materially improving a financial control environment, including policies, procedures, delegated authorities, reconciliations, segregation of duties and audit trails.	X		A, I, R
Experience leading or coordinating internal audit, external audit, audit action tracking and evidence preparation.	X		A, I, R
Experience of payroll controls, payroll reconciliations, payroll journals, staffing-cost forecasting and liaison with HR, payroll providers and relevant leaders.	X		A, I, T
Experience of pension administration, pension returns, pension reconciliations or pension audit requirements, preferably including TPS and/or LGPS.		X	A, I
Experience interrogating financial systems and underlying data to identify errors, trends, risks, control weaknesses and improvement opportunities.	X		A, I, T
Experience preparing reports or papers for senior leaders, committees, trustees, governors or equivalent governance bodies.	X		A, I, T
Experience supporting resource allocation, value for money, procurement, contract review, cost control or income maximisation.	X		A, I
Experience in a multi-site or complex organisation; academy trust, education, public sector, charity or regulated environment experience is strongly advantageous.	X		A, I
Experience of due diligence, onboarding, academy conversion, merger, new school integration or growth projects.		X	A, I
Experience of SEND, EYFS/nursery, pupil-number, school meals, lettings, wraparound, restricted funds or school-specific income analysis.		X	A, I

Professional Knowledge and Technical Capability

Criteria	Essential	Desirable	Evidence
Advanced Excel skills, including financial modelling, pivot tables, complex formulae, lookups, SUMIFS, scenario modelling, reconciliations, sensitivity analysis and model checking.	X		A, T
Ability to use data tools to create clear dashboards, reports and data visualisations, including Power BI or equivalent where available.	X		A, T
Strong understanding of management accounting, financial reporting, internal control, audit evidence, cashflow, reserves and balance sheet disciplines.	X		A, I, T
Strong understanding of payroll, pensions, staff-cost forecasting and financial treatment of staffing changes.	X		A, I
Knowledge of financial governance, scheme of delegation, delegated authorities, procurement controls, fraud prevention and risk management.	X		A, I
Knowledge of academy trust finance requirements, Academy Trust Handbook, DfE returns, funding agreements, charity/company requirements, Public Procurement Act, and public-sector stewardship.		X	A, I
Knowledge of academy funding, including GAG, pupil premium, SEND/EHCP, EYFS/nursery, grants, restricted funds, VAT and income recovery.		X	A, I
Confident user or administrator of finance systems and reporting tools; experience of IRIS/PS Financials, Access Education Finance, IRIS, Sage, Oracle, SAP, Arbor, IMP or similar is beneficial.		X	A, I
Understanding of data protection, confidentiality, system permissions and secure handling of payroll, staffing, pupil and financial data.	X		A, I
Ability to research technical finance, tax, funding or reporting matters, or where relevant engage relevant external expertise, and make clear recommendations.	X		A, I, T

Leadership, Personal Skills and Attributes

Criteria	Essential	Desirable	Evidence
Strategic and operational leadership: able to convert Trust priorities into plans, objectives, accountabilities, reporting and evidenced delivery.	X		A, I, R
Highly analytical, accurate and professionally curious, with the ability to test data back to source, reconcile differences, spot anomalies and explain implications.	X		A, I, T
Clear, concise and accurate communication, including ability to explain complex financial matters to non-finance colleagues without unnecessary jargon.	X		A, I, T
Confidence to challenge senior colleagues constructively and respectfully where assumptions, data quality, controls or proposed decisions are weak.	X		A, I, R
Effective people management skills, including coaching, prioritising, motivating, quality assurance, performance management and professional development.	X		A, I, R
Strong organisational skills and resilience, with ability to manage deadlines across month-end, payroll, audit, statutory returns, budgets, projects and committee cycles.	X		A, I, R
Sound judgement, discretion and confidentiality when dealing with payroll, staffing, pupil and financial information.	X		A, I, R
Values-led and principled in a practical way: integrity, stewardship of public money, high standards, respectful challenge, service and focus on outcomes for pupils.	X		A, I, R
Able to build strong relationships with relevant leaders, central teams, auditors, providers, regulators and finance colleagues while retaining professional independence.	X		A, I, R
Calm, credible and solutions-focused under pressure, with a strong sense of ownership and follow-through.	X		A, I, R
Commitment to continuous improvement, including simplification of processes, automation where appropriate and better use of financial systems and data.	X		A, I

Other Requirements

Criteria	Essential	Desirable	Evidence
Commitment to safeguarding and promoting the welfare of pupils and young people.	X		A, I, R
Commitment to the Trust's policies on equality, safeguarding, health and safety, data protection, financial management and professional conduct.	X		A, I
Willingness to undertake an enhanced DBS check and all relevant safer recruitment checks.	X		A

Criteria	Essential	Desirable	Evidence
Ability to travel between Trust schools and work flexibly to meet the needs of the role.	**X**		A, I
Commitment to supporting and demonstrating the vision and priorities of Lion Academy Trust.	**X**		A, I