



STEPHENSON (MK) TRUST

JOB PROFILE

POST TITLE: Finance Officer **GRADE:** Range 2-3, £25,979 – £30,296 (FTE)
LOCATION: Stephenson Academy **WEEKS:** 42 (term time plus 3)
RESPONSIBLE TO: Finance Manager & Principal **HOURS:** 25-30 hours, per week

JOB PURPOSE

The Trust Finance officer will work under the direction and guidance of the Academy principal and Finance Manager to ensure the efficient operation of the day-day financial administration within the Academy. The position offers the successful candidate an exciting opportunity to be part of the Trust's future, where collaboration and partnerships are believed to be the key to its success. This post is within the Central team structure, specifically the finance team.

The post holder will deliver operational financial support to the Academy and liaise with Central finance and support services within the Trust, to maintain an effective finance and administrative service whilst contributing towards the broader priorities and objectives of the Trust Finance team. The post holder will ensure financial regularity and compliance across the Trust to the Academies Trust Handbook (ATH), Trust policies, company and charity law.

The post holder will provide a key link between the Finance Manager, Head of Operations, HR and the finance team. Their role is to support the principal and budget holders on an operational level by providing financial management and purchasing support, Administrative management and HR support to ensure compliance with reporting deadlines, Trust policies and Operational objectives of the Academy

Key Tasks

- **Financial Management & Reporting:** Support Academies with budget monitoring, purchasing and procurement, monthly reporting, ensuring financial decisions align with the Trust's strategic goals.
- **Administrative Management:** Ensure the Academy adheres to purchasing guidelines, administer support for new accounts and ensure contract file is maintained.
- **HR support:** Collaborate with the central HR team to facilitate recruitment and on-boarding of new staff.

- **Operations Management:** Liaise with Premises and Operations team to ensure compliance with Estates management, Fixed assets, procurement and IT
- **Financial Skills Development:** Provide training and support to school staff on financial procedures and systems to enhance the financial skills of Academy staff as appropriate.

Main Purpose:

- Support the Principal and Finance Manager in delivering financial and administrative objectives
- Deputise for the Office Manager where applicable
- Ensure financial regularity and compliance across the Trust to the Academy Trust Handbook (ATH), Trust policies, company and charity law.
- Financial leadership and support on accounting/costing matters to the wider finance team and staff across the Trust.
- Be responsible for Academy level input into audits and management accounts. Support with budgets, monitoring and forecasting.

Financial Management/Controls

- Ensure all financial procedures and policies are followed robustly
- Provide a high level of support to the Academy budget holders to ensure purchasing is undertaken in line with policy, accounts are set up correctly and the scheme of delegation is adhered to.
- Support the ordering and goods receipting process on Access financials to maintain the accuracy and validity of the accounting system
- Ensure issues with invoices, queries and orders are dealt with in a timely manner to facilitate the processing of expenditure and income for the Academy.
- Provide support to budget holders regarding ordering, identifying preferred suppliers, negotiating discounts and ensuring best value for services procured.
- Investigate discrepancies and liaise with the Central finance team for resolution.
- Develop and maintain a contract file for subscriptions, licenses and annual spend to inform budget setting and reporting
- Support the internal and external audit programme of the Trust as required
- Complete monthly budget monitoring reporting and maintain monthly schedules for contracts and Fixed Assets
- Complete monthly journals, including recharges and payroll journals
- Complete termly recharges and review bandings and LA income in conjunction with the Finance Manger
- Complete monthly bank reconciliation information for DDs and Credit card postings
- Record and manage the Academy asset register in conjunction with the IT manager and Head of Operations
- Manage and maintain the Academy contract register
- Lead contact for external and internal audit, ensuring action plans are developed and implemented to improve the financial practices.

Operational Compliance

- Attend and participate in finance meetings held with Academies and Principals
- Work with Estates and IT leads to develop, implement and monitor rolling 5-year plans.
- Work with school senior leaders to provide financial support for delegated budgets.
- Assist with Integrated Curriculum Financial Planning.
- Ensure correct procedures are implemented and processes are carried out in line with policy
- Support in dealing with queries and problems escalated by office staff and take action as appropriate to resolve
- Provide cover for Admin/reception if required

HR support

- Action any HR related projects or returns as instructed by the Finance and HR manager
- Support the HR services and processes for Academy staff
- Ensure any Academy contract changes are sent to HR for processing and ensure adherence to safer recruitment is followed.

General Support Function

- Monitor ringfenced funds and report on these as required.
- Preparation of statutory returns.
- Ensure the smooth functioning of the purchase and sales ledger, ensuring postings are accurate.
- Lead on financial queries.
- Keep abreast of funding and legislative changes and commit to any training required within the post
- Provide admin support as and when required to the Academy SLT
- Maintain confidentiality at all times in respect of Trust related matters and prevent disclosure of confidential and sensitive information
- Undertake any other duties of a similar level and responsibility as may be requested by the CFO and senior leadership team.

Person Specification

Job Title: Finance Officer
Location: Stephenson Academy

CRITERIA		E/D
QUALIFICATIONS	<ul style="list-style-type: none"> • Good standard of education (5 GCSEs or equivalent) • AAT / ISBL qualification or further qualifications in Finance & Admin • Financial training • 2 years or more of working in a school environment • Office administration • Finance training & experience of working as part of a team 	E D D D E E
EXPERIENCE	<ul style="list-style-type: none"> • Previous experience in an educational setting • SIMS experience • IT literate – Word/Excel/Outlook • Access financials software (HCSS) • Access budgets software knowledge • Ability to communicate effectively, at all levels verbally and in writing 	D E D D E E
KNOWLEDGE	<ul style="list-style-type: none"> • Understanding the importance of Confidentiality and appreciation of the implication of GDPR/Cyber security • Understanding of the context in which Academies are operating (ATH), and an understanding of Health and safety issues relevant to the post • Understanding of safeguarding and safer recruitment practices • Understanding of and commitment to equal opportunities, and the ability to apply this consistently 	E D D D
SKILLS	<ul style="list-style-type: none"> • Attention to detail and the ability to identify opportunities for improvement • Ability to work independently and make sound judgements about processing and correspondence • Excellent time management skills • Excellent interpersonal and communication skills • Ability to operate effectively in a team contribute to the friendly and supportive Academy environment • Numeracy skills and ability to manipulate data effectively 	E E E D D D
OTHER REQUIREMENTS	<ul style="list-style-type: none"> • Willingness to be flexible with working hours to respond to Academy's needs • Resilient and reliable • Self-motivated with a drive to succeed 	E E E

