



Job Description

Details of Post

- Title: Trust Finance Manager
- Trust: TrustEd Schools Alliance
- Reporting to: Director of Finance / Trust Business Manager
- Main Workplace: Trust Central Offices
- Grade and SCP: Grade 10 (SCP 26-28)

The Trust is committed to safeguarding and promoting the welfare of its pupils and expects all staff and volunteers to share this commitment. All appointments are subject to an enhanced Disclosure and Barring Service (DBS) check.

All support staff posts are subject to the Asylum and Immigration requirements.

Purpose of Post

- Support the Director of Finance and Trust Business Manager to provide leadership and management of the financial performance of the Trust.
- Support the Director of Finance as outlined in the Academy Trust Handbook and other documents from the DfE.

This translates as the responsibility to:

- Ensure good financial management, together with the Director of Finance and Trust Business Manager, so that public money is safeguarded at all times and managed efficiently, ethically, professionally, with integrity and conforming to all internal and external regulatory requirements and in a sustainably sound manner in the delivery of the Trust's core aims.
- Provide sound financial advice to the Director of Finance and Trust Business Manager and senior management colleagues as required.
- Together with the Director of Finance and Trust Business Manager, ensure the Trust reports, on a timely basis to the Department for Education and other relevant bodies in line with their specific requirements.

Principal Duties and Responsibilities

1. Leadership & Strategy

- Attend Senior Leadership Team meetings as required.
- In the absence of the Director of Finance and Trust Business Manager, take delegated responsibility for financial and other decisions.
- Assist the Headteacher with change management in accordance with the school development/strategic plan.

2. Financial Resource Management

- Together with the Director of Finance and Trust Business Manager, ensure that financial management within the Trust as a whole and each individual academy, complies with the requirements of the Academy Trust Handbook and Academies' Accounts Direction issued annually by the DfE, which sets out the requirements for the preparation and audit of the annual reports and financial statements of the Trust.
- Ensure that monthly management accounts and other ad hoc reports as required are prepared on a timely basis and provided to the Trust Business Manager along with appropriate management commentary comparing performance against budget and analysing variances.
- Work with the Director of Finance and Trust Business Manager to prepare a three-year financial plan considering DfE guidelines / funding and identifying additional sources of external revenue and funding.
- Act as a key officer for specified schools and advise those Headteachers in preparing academy budgets and current budget positions.
- Provide support and guidance to Trust schools, including
 - Understanding of and compliance with financial regulations.
 - Production of all necessary financial reports.
- Advise the Headteacher, Director of Finance and Trust Business Manager if fraudulent activities are suspected or uncovered.
- Keep abreast of financial developments, in terms of budgets and financial commitments by keeping in touch with key professional bodies (e.g. DFE, Teachers' Pensions, LGPS etc).
- Support the Trust Business Manager to manage and oversee the Trust assets ensuring that the full inventory of assets is recorded in an asset register and that accounting for fixed assets is in accordance with Companies Act and appropriate accounting standards.
- Be aware of opportunities to develop income for the Trust and its academies.
- Monitor the operation and effectiveness of Trust financial policies and procedures and provide support where necessary.

3. Management Information Systems & ICT

- Develop and manage the budgeting module of the financial system for the Trust

4. Other Responsibilities

- Be aware of and comply with policies and procedures relating to child protection, health, safety and security, confidentiality and data protection, reporting all concerns to an appropriate person.
- Be aware of and support difference and ensure equal opportunities for all.
- Contribute to the overall ethos/work/aims of the school.
- Appreciate and support the role of other professionals.
- Attend and participate in relevant meetings as required.
- Participate in training and other learning activities and performance development as required.

5. Safeguarding

- Be aware of and comply with safeguarding responsibilities as outlined in the Trust's Staff Code of Conduct and related policies and procedures. This may include reference to the Shropshire Career Pathway Safeguarding JD for Trust staff.

6. Data Protection and other statutory responsibilities

- Be aware of and comply with data protection responsibilities as outlined in the Trust’s Staff Code of Conduct and related policies and procedures. This may include reference to the Shropshire Career Pathway Data Protection JD for school staff.

7. Other Duties

- Any other duties that the Director of Finance/CEO/Trust Business Manager/Trustees feel is commensurate with the post. Whilst every effort is made to explain the main duties and responsibilities of the post each individual task undertaken may not be identified.

8. Review and Signatures

- This job description is subject to review by the Director of Finance/CEO/Trust Business Manager/Trustees in negotiation with the post holder at any time. However, an annual review of this job description and allocation of responsibilities will take place as part of agreed performance management arrangements.

Job Description and Personal Specification agreed by:

Post holder:

Signed: **Date:**

Name of line manager:

Signed: **Date:**

PERSON SPECIFICATION	
Criteria	Essential (E) / Desirable (D)
Qualifications	
A recognised accounting qualification (e.g. AAT Level 4, ACCA, CIMA, CIPFA, ACA) or significant equivalent finance experience	E
Evidence of continuing professional development	E
Degree or relevant higher-level qualification in Finance, Accounting, Business Management or related discipline	D
Experience	
Proven experience of financial management, budgeting and financial reporting	E
Experience of producing management accounts and financial analysis reports	E
Experience of working within financial regulations and regulatory frameworks	E
Experience of supporting budget holders and senior leaders with financial planning and decision making	E
Experience of preparing multi-year financial forecasts and plans	E
Experience of working within the education sector, academy trusts or local authority-maintained schools	D
Knowledge	
Strong understanding of financial management principles, budgeting and forecasting	E
Understanding of the Academy Trust Handbook and Academies Accounts Direction	D
Knowledge of education funding arrangements and DfE financial guidance	D
Skills and Abilities	
Excellent financial analysis and problem-solving skills	E
Ability to interpret complex financial information and present it clearly to non-financial colleagues	E
Strong organisational skills with the ability to prioritise competing demands and meet deadlines	E
High level of accuracy and attention to detail	E
Ability to develop effective working relationships with Headteachers, senior leaders and external stakeholders	E
Ability to work independently and exercise professional judgement	E
Strong written and verbal communication skills	E
Competent user of financial management systems, Microsoft Excel and other ICT applications	E
Ability to support and influence strategic decision making through sound financial advice	E
Personal Qualities	
Demonstrates integrity, professionalism and commitment to ethical financial management	E
Commitment to safeguarding and promoting the welfare of children and young people	E
Commitment to equality, diversity and inclusion	E
Flexible and adaptable approach to work	E
Ability to maintain confidentiality and handle sensitive information appropriately	E

Commitment to continuous improvement and professional development	E
Resilient and proactive with a positive approach to change management	D
<u>Other Requirements</u>	
Willingness to attend meetings across Trust sites as required	E
Satisfactory enhanced DBS clearance	E
Right to work in the UK	E