

## Job Description

<b>Job Title</b>	Trust Finance Officer
<b>Accountable to</b>	Chief Executive Officer
<b>Salary</b>	£43,905 - £67,425
<b>Hours</b>	Full time, 52 weeks a year, 7.5 hours a day
<b>Purpose</b>	<p>To perform the role of Finance Officer for The Eastwood Academy.</p> <p>To perform the role of Finance Officer for the Trust (EPAT).</p> <p>To provide expertise on finance and accounting to optimise the Trust's financial performance and strategic position.</p> <p>To undertake the role of Chief Finance Officer as outlined in the ESFA Academies Financial Handbook.</p>
<b>Key Duties and Responsibilities</b>	<p>This is a senior post that will evolve over time. The post holder needs to be responsive and proactive in the context of strategic priorities. The following is a list of indicative duties and responsibilities.</p> <p><b>Strategic</b></p> <ul style="list-style-type: none"> <li>• Ensure changes imposed by the ESFA/DfE are noted and relevant staff are made aware, incorporating the changes into current working practices.</li> <li>• Provide the finance staff at each academy with a timetable for the production of monthly/quarterly reports and budgets.</li> <li>• Assist each academy with the compilation of their annual budget and 3 year budget plans</li> <li>• Compile the annual budget and 3 year budget plans for the Trust.</li> <li>• Provide strategic advice to the Members, Trustees, CEO and academy Principals on all issues relating to financial matters.</li> <li>• Build strong working relationships with the ESFA, HMRC, DfE and external auditors.</li> <li>• Be accountable to the CEO for the proper financial operations of the Trust.</li> </ul> <p><b>Operational</b></p> <ul style="list-style-type: none"> <li>• Provide Trustees with accurate information relating to actual income and expenditure against budget at academy and Trust level each month.</li> <li>• Provide Trustees with quarterly information, benchmarking against agreed KPIs.</li> <li>• Assist the academy finance staff as required.</li> <li>• Contribute to the development, compilation and submission of bids for grants and other income streams.</li> <li>• Review and improve where necessary the existing Trust's financial systems and policies, ensuring that they are robust, compliant, and support current activities and future growth.</li> </ul>

	<ul style="list-style-type: none"> <li>• Ensure that there are appropriate controls in place to safeguard the Trust's assets.</li> <li>• Attend and contribute to Board and Finance and Audit Committee meetings.</li> <li>• Ensure that the Trust's accounts are maintained in accordance with the Trust's funding agreement and the AFH.</li> <li>• Ensure that all financial returns required by the ESFA are accurate and submitted by the specified deadline.</li> <li>• Liaise with the Trust's auditors making all appropriate arrangements for the audit of the annual accounts, TP EOYC and responsible officer visits to each academy.</li> <li>• Be conversant with the relevant legislation affecting the Trust's Annual Financial Statements.</li> <li>• Review and update as required the Trust's finance policies.</li> <li>• Submit the Trust's monthly consolidated VAT126 return.</li> <li>• Ensure that the Trust achieves value for money across all its activities.</li> <li>• Assist the Business Manager with the negotiation and monitoring of contracts and agreements.</li> </ul>
<b>CPD</b>	<ul style="list-style-type: none"> <li>• The post holder will need to take responsibility for their personal professional development, keeping up-to-date with research and developments related to school efficiency.</li> <li>• Undergo appropriate training to support the delivery of specified work in order to enhance their skills for the post.</li> <li>• Deliver CPD relating to financial matters to Member, Trustees and academy finance staff.</li> <li>• Maintain appropriate evidence in support of post holders Performance Management process.</li> </ul>
<b>General</b>	<ul style="list-style-type: none"> <li>• Attend meetings within and outside the Trust as required.</li> <li>• Maintain confidentiality and observe data protection laws in line with the Trust's policies.</li> <li>• Undertake such other duties as directed by the CEO.</li> </ul>

# EPAT

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## Person Specification

	Essential	Desirable	Method of Assessment
<b>Qualification</b> <ul style="list-style-type: none"> <li>Degree or relevant equivalent qualification or experience.</li> <li>Qualified accounts accreditation or relevant equivalent qualification or experience.</li> </ul>	✓	✓	Application form / Interview / Certificate
<b>Experience, Knowledge &amp; Understanding</b> <ul style="list-style-type: none"> <li>Should be able to demonstrate a track record of successful financial leadership.</li> <li>Will have financial reporting and management skills in a multi-entity environment, experience of working with stakeholders to develop strong financial understanding and empathy across an organisation.</li> <li>Should have high ethical standards with the ability to engage effectively with all staff across the Trust and with Members and Trustees</li> <li>Should have excellent analytical skills and sound judgement.</li> <li>Should have excellent communication and presentational skills.</li> <li>Should have experience of the Trust's financial information system SIMS FMS.</li> <li>Should be computer literate, particularly Word and Excel.</li> <li>Should have a good knowledge of the funding, regulatory and legislative environment of academies.</li> <li>Should be familiar with ESFA reporting requirement.</li> </ul>	✓	✓         	Application form / Interview
<b>Personal Qualities</b> <ul style="list-style-type: none"> <li>Excellent interpersonal skills.</li> <li>Excellent communication and presentational skills.</li> <li>Excellent time keeping and attendance.</li> <li>Methodical and organised approach to work.</li> <li>Positive/can do approach.</li> <li>Capacity to work under pressure to meet deadlines.</li> <li>Flexible approach to working hours.</li> </ul>		✓ ✓  ✓ ✓ ✓  ✓	Application form / Interview

<b>Other</b> <ul style="list-style-type: none"> <li>• Willingness to undertake an Enhanced Disclosure and Barring Service check.</li> <li>• Driving licence and own transport.</li> </ul>	✓  ✓		
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