



Finance and Contracts Officer

Based at: Totnes St Johns C of E Primary School

Salary: Devon Grade E, £31,525 - £34,811 p.a.

Contract: Full-time, permanent

Reporting to: Chief Financial Officer (CFO)

Working closely with: CFO, Finance Team, contract owners, school and central teams, suppliers and advisers

Purpose

The Finance and Contracts Officer will provide reliable, flexible support across the Trust's central finance function while taking day-to-day responsibility for the administration of the Trust's contracts portfolio. The postholder will maintain accurate contract records, coordinate renewal and procurement activity, support contract owners through tendering and contract administration, and ensure associated purchase orders, budget changes and approvals are completed correctly. Alongside this portfolio, the postholder will undertake a varied range of finance duties across purchase ledger, sales ledger, trips and visits, lettings, projects and donations. The role requires someone who is adaptable, organised and comfortable moving between priorities as the Trust develops its systems and ways of working, including the introduction and continued development of iPlicit (Our new financial management system).

Main Duties

Contracts administration and procurement

- Maintain a comprehensive and accurate Trust contracts register, recording contract owners, suppliers, values, procurement routes, start and end dates, notice periods, extension options, key obligations and links to supporting documentation.
- Monitor renewal, notice and expiry dates; maintain a forward procurement plan; and flag required action to the CFO/DoO and contract owners in sufficient time for an orderly review or procurement exercise.
- Work with contract owners to confirm requirements, specifications, budgets, approvals, procurement routes and realistic timescales for new and renewing contracts.
- Support and administer quotation exercises, tenders and framework call-offs under appropriate direction, coordinating documentation, timetables, supplier communications, clarification records, declarations of interest, evaluation records and approvals.
- Maintain a complete and accessible audit trail for procurement and contract decisions, ensuring activity follows Trust policies, financial regulations, delegated authorities and applicable public-sector and academy requirements.
- Support supplier onboarding, contract mobilisation, performance reviews, variations, extensions and closure; record agreed actions and escalate service, compliance or commercial concerns promptly.
- Prepare and coordinate purchase orders relating to contracts, checking coding, value, supporting documents, delivery periods and approval before commitments are entered into.

- Coordinate budget checks and authorised budget changes, monitor contract commitments and expenditure, and investigate discrepancies between contracts, purchase orders, invoices and budgets.
- Produce routine reports on contract commitments, forthcoming renewals, procurement activity and supplier performance for Contract Leads/Category Managers.
- Provide practical guidance to contract owners and colleagues on routine processes, referring complex procurement, legal or commercial matters to the CFO/CoO or specialist advisers.

Finance operations

- Undertake a flexible portfolio of finance responsibilities across purchase ledger, sales ledger, trips and visits, lettings, projects and donations, providing cover and support wherever priorities and deadlines require.
- Process and review purchase orders, goods or service receipt records, supplier invoices, supplier details, statement reconciliations, payment information and purchase ledger queries in line with agreed controls.
- Raise sales invoices and credit notes, record and allocate income, support credit control, process authorised refunds and help resolve sales ledger queries.
- Support the financial administration of trips, visits and lettings, including set-up checks, income and expenditure recording, reconciliations, supporting evidence and liaison with school staff.
- Maintain accurate financial records for projects, grants and donations, ensuring income and expenditure are identified correctly and relevant conditions, approvals and evidence are retained.
- Complete journals, reconciliations, routine reports, month-end and year-end tasks, audit evidence and other finance checks as allocated.
- Assist with the preparation of routine financial reports and management information as required.

Systems, service and team working

- Use iPlicit and other Trust systems effectively, supporting data quality, workflow testing, implementation activity and the continued development of consistent digital processes.
- Help document and improve procedures, strengthen controls, remove unnecessary duplication and support colleagues to use finance and procurement processes correctly.
- Build constructive working relationships and provide a responsive, professional service to schools, contract owners, suppliers and colleagues, following matters through to resolution.
- Plan and reprioritise work across several activity streams, contribute to wider central finance tasks and projects, and provide flexible cover during periods of change or peak workload.

Expectations

The postholder will be expected to:

- Safeguard and promote the welfare of children and young people, following Trust procedures and reporting any concerns promptly.
- Comply with Trust policies and procedures, including financial regulations, procurement requirements, equality, information security and data protection.
- Maintain confidentiality, exercise appropriate professional judgement and protect the integrity and security of financial, contractual and personal information.
- Take reasonable care for their own health and safety and that of others, and cooperate with Trust health and safety arrangements.
- Take responsibility for relevant continuing professional development and keep knowledge of finance, contracts and procurement requirements up to date.
- Participate positively in induction, supervision, team meetings and the Trust's performance review arrangements.

- Work flexibly across Trust sites and, where reasonably required, adjust working arrangements to meet business priorities and key deadlines.
- Travel between Trust locations and attend meetings or training as the role reasonably requires.
- Support Trust arrangements for emergencies, business continuity and periods of operational pressure.
- Provide courteous, inclusive and professional service and act as a positive ambassador for the Trust when dealing with internal and external stakeholders.
- Demonstrate the Trust's values and contribute actively to a collaborative, supportive and improvement-focused culture.
- Undertake other duties reasonably requested by the line manager that are commensurate with the grade and do not change the general character of the post.

Person Specification

The successful candidate will combine strong organisation and attention to detail with the flexibility to contribute across a busy central finance team. They will be able to take ownership of routine contract administration, keep actions moving and provide reliable financial support, while recognising when matters require escalation. The criteria below will be used to assess suitability for the role.

	Essential	Desirable
Qualifications	• GCSE English and mathematics at grade C/4 or above, or equivalent qualifications. • Relevant training or equivalent practical experience in finance, procurement, contracts or business administration.	• AAT Level 2 or 3, or another relevant finance qualification (or willingness to work towards one). • CIPS, contract management or procurement qualification at an appropriate level (or willingness to work towards one).
Experience	• Experience in a finance, procurement, contracts or business administration role involving accurate transactional or records based work. • Experience maintaining registers, records or action logs and monitoring deadlines through to completion. • Experience using finance, ERP or business administration systems and Microsoft Excel. • Experience following procedures, checking approvals and maintaining reliable supporting evidence or audit trails. • Experience managing a varied workload and meeting competing deadlines.	• Purchase ledger, sales ledger, reconciliations, school income or credit control experience. • Experience maintaining a contracts register or supporting quotations, tenders, frameworks or contract reviews. • Experience in an academy trust, school, public-sector or similarly regulated environment. • Experience supporting multiple sites, cost centres or budget holders. • Experience of iPlicit or another cloud-based finance system.
Knowledge & Skills	• Strong numeracy, accuracy and attention to detail, with confidence checking financial and contractual information and strong Excel skills.	• Awareness of public-sector procurement principles, including quotations, tenders and frameworks.

	Essential	Desirable
	• Sound understanding of purchase orders, coding, budgets, authorisation and the need for a clear audit trail. • Ability to identify key dates and requirements from contract information, follow agreed processes and escalate matters at the right time. • Excellent organisation, forward planning and follow-through across several workstreams. • Clear written and verbal communication and the ability to build constructive relationships with colleagues and suppliers. • Good digital skills, including confident use of Excel and the ability to learn new systems quickly. • Understanding of confidentiality, data protection and information security. • A practical, customer-focused approach to problem solving and process improvement.	• Awareness of academy financial requirements and the Academy Trust Handbook. • Understanding of supplier performance monitoring and routine contract administration. • Basic understanding of VAT as it applies to finance processing.
Personal Competencies	• Adaptable and flexible, with a genuine willingness to switch between contract administration and wider finance priorities. • Proactive, methodical and dependable, taking ownership of routine actions and following them through. • Solution-focused, with sound judgement and the confidence to ask questions or escalate concerns. • Calm and resilient when priorities change or deadlines converge. • Collaborative, approachable and committed to providing a responsive service. • High standards of integrity, discretion and personal accountability. • Commitment to the Trust's values, equality and safeguarding responsibilities. • Able and willing to travel between Trust sites where the role requires it.	• Enthusiasm for developing a career spanning finance, contracts and procurement.