



# **Job Description and Person Specification**

## **Finance Officer**

Shared Services Team

Grade: SO1-SO2

Reporting to: Chief Financial Officer/Finance Manager

The Saint John Southworth Catholic Academy Trust is committed to creating a diverse workforce. We will consider all qualified applicants for employment without regard to sex, race, religion, belief, sexual orientation, gender reassignment, pregnancy, maternity, age, disability, marriage or civil partnership.

This is a school-based role that will involve contact with children.

# Job Description

## Key Duties and Responsibilities

### Financial Management and Operations

- To oversee and maintain the day-to-day financial operations of assigned schools within the Trust
- To ensure timely and accurate processing of transactions, including purchase orders, invoices, journals and reconciliations
- To manage control accounts, bank reconciliations, payroll reconciliations and income systems such as Arbor and PayPal
- To assist in maintaining the integrity of the Trust's accounting systems and records

### Budgeting and Financial Reporting

- To support the Chief Financial Officer (CFO) and Finance Manager in the preparation, consolidation and review of annual budgets and multi-year financial plans
- To prepare monthly management accounts, variance analyses and reports for Budget Holders, the Senior Leadership Team and Trustees
- To contribute to scenario modelling and financial forecasting to support strategic decision-making

### Compliance and Audit

- To ensure compliance with Department for Education (DfE) requirements, Trust Financial Regulations and statutory reporting deadlines
- To prepare documentation and reconciliations for internal and external audits
- To support the preparation and submission of statutory returns, VAT claims and other financial submissions
- To maintain records to ensure compliance with payroll, taxation and pension obligations
- To promote sustainability and value for money in all aspects of financial management, contributing to efficient resource use and environmental responsibility

### Systems, Analysis and Improvement

- To maintain and develop the Trust's financial systems, ensuring data integrity and accuracy
- To support the continued development and implementation of digital finance tools and dashboards, ensuring that financial information is accessible, accurate and supports data-driven decision-making
- To lead on process improvement initiatives to increase efficiency and strengthen internal controls
- To prepare and analyse financial data for internal and external stakeholders, including the DfE, auditors and the Trust Board

### Income Generation and Asset Management

- To support the CFO and Finance Manager in identifying new income opportunities and funding streams

- To manage public and voluntary accounts, lettings and parental contributions etc., ensuring full reconciliation and audit readiness
- To oversee the recording, monitoring and disposal of Trust assets, ensuring compliance with financial procedures

#### Cross-Trust Collaboration

- To work collaboratively with the Human Resources Team, the Facilities Management Team and other operations colleagues to ensure cohesive planning, accurate reporting and integrated business support across the Trust
- To support Office Managers in schools as appropriate to the role
- To manage and support Finance Assistants and trainee accountants

#### Advisory and Support

- To provide financial guidance and training to school-based administrators and Budget Holders
- To build effective relationships with internal and external stakeholders, including suppliers, auditors and regulatory bodies
- To represent the Finance Team at meetings when required and contribute to cross-Trust initiatives

#### **Corporate Responsibilities**

- To contribute to a working environment underpinned by the principles of Catholic Social Teaching
- To ensure probity, propriety and adherence to the Nolan Principles both in personal conduct and throughout the Trust
- To comply with policies and procedures relating to Child Protection; being vigilant for signs that children may be being abused and reporting any such suspicions, no matter how small, to the Designated Safeguarding Lead or in the case of concerns about a member of staff, the Headteacher
- To comply with all other policies, procedures, working practices and regulations, in particular, Equality and Diversity, Health and Safety, Confidentiality, Data Protection, Financial Regulations in line with our Scheme of Delegation
- To uphold an individual and organisational commitment to a culture of safeguarding for all
- To be accountable to and carry out any reasonable request from the Headteacher(s) / Line Manager

#### **Professional Development**

- To be committed to own professional development
- To establish and participate in training opportunities, meetings and networks to support and maintain excellent skills, techniques and knowledge
- To seek feedback and act on it to improve performance within and beyond formal coaching and appraisal opportunities
- To undergo regular observations and participate in regular in-service training (INSET) as part of CPD

## Fluency Duty

In line with Part 7 of the Immigration Act 2016, the Government has created a duty to ensure that all Public Authority staff working in customer facing roles can speak fluent English to an appropriate standard. For this role, the post holder is required to meet the advanced fluency level. The post holder should demonstrate they can:

- Express themselves fluently and spontaneously at length effortlessly
- Explain difficult concepts simply without hindering the natural smooth flow of language
- Take responsibility for promoting high standards of literacy, articulacy and the correct use of standard English in the Trust

We are committed to safeguarding and promoting the welfare of children and we expect all staff to share this commitment. All successful staff will undertake an Enhanced Disclosure and Barring Service Check with Children's Barred List.

This post is exempt from the Rehabilitation of Offenders Act (ROA) 1974. The amendments to the ROA 1974 (Exceptions Order 1975, (amended 2013 and 2020)) provides that when applying for certain jobs, certain spent convictions and cautions are protected and they do not need to be disclosed to employers. If they are disclosed, employers cannot take them into account. Guidance about whether a conviction or caution should be disclosed can be found on the [Ministry of Justice website](#) and further information about filtering offences can be found in [DBS filtering guide](#).

The Trust is committed to making any necessary reasonable adjustments to the job role and the working environment that would enable access to employment opportunities for disabled job applicants or continued employment for any employee who develops a disabling condition.

Date: November 2025

This job description is illustrative of the responsibility of the post and not necessarily a comprehensive list of tasks.

Post holders are expected to undertake work in line with the level and pay band of the post determined by the Line Manager.

This job description will be reviewed with the post holder in relation to need or on an annual basis through appraisal and whole-Trust review of strategy and effectiveness.

Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

# Person Specification

	Essential Requirements	Desirable Requirements	How Identified
<b>Qualifications</b>	<ul style="list-style-type: none"> <li>Minimum of five GCSEs (A-C/4+) including English and Maths or equivalent e.g., Adult Literacy/Numeracy at level 2</li> <li>AAT Level 4 or equivalent; or part-qualified ACCA/CIMA/CIPFA</li> </ul>	<ul style="list-style-type: none"> <li>Full ACCA, CIMA, or CIPFA qualification; Degree in Accounting or Finance</li> </ul>	<ul style="list-style-type: none"> <li>Application</li> </ul>
<b>Experience</b>	<ul style="list-style-type: none"> <li>Demonstrable experience in financial reporting, reconciliations and budget monitoring</li> <li>Experience working with financial systems and controls</li> </ul>	<ul style="list-style-type: none"> <li>Experience in education, charity, or public sector finance; experience supporting external audit or supervising others</li> </ul>	<ul style="list-style-type: none"> <li>Application</li> <li>Interview</li> </ul>
<b>Knowledge, Skills and Ability</b>	<ul style="list-style-type: none"> <li>Strong technical knowledge of accounting principles</li> <li>Excellent analytical and Excel skills</li> <li>Ability to interpret and explain financial information</li> <li>Understanding of DfE finance regulations</li> <li>Strong organisational and communication skills</li> <li>Ability to respond quickly and effectively to issues that arise</li> <li>Excellent attention to detail</li> <li>Understanding of data protection and confidentiality</li> </ul>	<ul style="list-style-type: none"> <li>Experience with Access or similar finance systems</li> <li>Awareness of Catholic Academy Trust structures</li> <li>Understanding of Catholic education and ethos</li> </ul>	<ul style="list-style-type: none"> <li>Application</li> <li>Interview</li> <li>References</li> <li>Work-related Assessment and through probation period</li> </ul>

	<ul style="list-style-type: none"> <li>• Ability to use initiative and sometimes work unsupervised</li> <li>• Excellent literacy, numerical, analytical and problem-solving skills</li> <li>• A proactive approach to identifying and resolving issues creatively and flexibly</li> <li>• Ability to communicate effectively both orally and in writing to a variety of audiences</li> <li>• Excellent stakeholder service skills and the ability to understand the needs of the Trust</li> <li>• Excellent organisational and time management skills and the ability to prioritise work for oneself</li> <li>• Ability to disseminate knowledge and good practice to other members of the Trust</li> <li>• Understanding of the need to meet internal and external deadlines</li> </ul>		
<b>Character and Values</b>	<ul style="list-style-type: none"> <li>• High commitment to safeguarding and promoting the welfare of children</li> <li>• A passion for education and a deepfelt desire to make a difference for young people</li> <li>• Commitment to the Trust agenda for</li> </ul>	<ul style="list-style-type: none"> <li>• Interest in the Trust's wider role in its communities</li> <li>• Commitment to the ethos and values of a Catholic Academy Trust</li> </ul>	<ul style="list-style-type: none"> <li>• Application</li> <li>• Interview</li> </ul>

	<p>inclusion, diversity and equality</p> <ul style="list-style-type: none"> <li>• Commitment to the seven principles of public life of selflessness, integrity, objectivity, accountability, openness, honesty, and leadership</li> <li>• Humility: a recognition that the more you know, the less you know and not being afraid to say, 'I do not know'</li> <li>• Emotionally intelligent: know when to direct and when to challenge</li> <li>• Able to listen and show awareness of other's sensitivities; have personal pride and lead by example</li> <li>• Understand the importance of work/life balance</li> <li>• Resilient, flexible and hardworking</li> <li>• Proactive, detail-oriented, and reliable</li> <li>• Committed to accuracy and integrity</li> <li>• Collaborative team player</li> <li>• Commitment to continuous learning</li> </ul>		
<b>Personal Circumstances</b>	<ul style="list-style-type: none"> <li>• Legally entitled to work in the UK</li> <li>• Ability to perform all duties and tasks with reasonable adjustments, where appropriate, in</li> </ul>		<ul style="list-style-type: none"> <li>• References</li> <li>• Interview</li> </ul>

| accordance with the |  
| Equality Act 2010 |