



JOB DESCRIPTION

JOB TITLE: FINANCE & OPERATIONS MANAGER

GRADE: G (Point 24-28) – Starting point on scale dependent on prior experience- to be negotiated on appointment.

HOURS: Term time + 3 weeks - hours to be determined upon appointment.

Responsible to: Headteacher (HT), Deputy Headteacher (DHT) and Trust Board.

Job Summary

As part of a substantial office restructure, Wensley Fold CE Primary Academy Trust is seeking an experienced and strategically minded Operations Manager to lead our finance, HR, estates, and support services. Reporting to the Head Teacher and Trust Board, you will play a central role in ensuring the trust's financial sustainability, operational efficiency, and compliance with statutory obligations. This is a senior leadership position requiring strong financial expertise, excellent organisational skills, and the ability to manage diverse teams and functions within a busy school environment. The role offers the opportunity to make a significant impact on the long-term success and development of the trust.

As this is a newly formed position, this is also a great opportunity to embark on training for candidates with the passion and drive to further develop their skills and experience to succeed at this role.

1. Role Overview

The Operations Manager is a senior role in school, reporting directly to the HT and DHT, with responsibility for the strategic and operational management of the school's finance, administration, estates, HR, and compliance functions. The role ensures the efficient, safe, and financially sustainable operation of the school while supporting long-term planning and the delivery of high-quality education.

The postholder acts as link to the Governors and a key adviser on financial, legal, and operational matters. The role requires significant leadership experience, strong financial acumen, and the ability to manage diverse support functions within a busy school environment.

2. Key Responsibilities

Financial Management

- To train in/ embed the understanding of the budgeting and finance systems used by the school.
- Lead all financial planning, policy, and management across the school, under the direction of the Head Teacher, Deputy Head Teacher and Trust Board.
- Prepare annual budgets, forecasts, and financial strategies aligned to the school's long-term objectives, supported by the related software systems e.g. Access.
- Monitor income, expenditure, KPIs, and cash flow; provide regular financial reports to the Head Teacher, Deputy Head Teacher Finance Committee and Trust Board.

- Prepare and analyse monthly monitoring of expenditure and report to HT
- Reconcile accounts.
- Oversee accounts payable/receivable, payroll, pensions administration, and compliance with PAYE, NI, and relevant tax and statutory requirements.
- Use financial software to prepare accounts and associated reports in line with the expectations of the DfE financial academies handbook.
- Work with external accountants to support audit processes.
- Scrutinise and authorise invoices, analyse costs, and identify opportunities for savings and efficiency
- Oversee financial management of any subsidiary activities, including Nursery.
- To ensure in the procurement process, including reviewing and securing appropriate service contracts, licences and insurance.

Strategic Planning

- Contribute to school-wide strategic and operational planning, including long-term financial forecasting, under the guidance of the Head Teacher.
- Support development of the School Improvement Plan.
- Advise Governors and senior leaders on financial, legal, and operational implications of strategic decisions.

Human Resources

- Oversee compliance with employment law, equal opportunities, safer recruitment, and HR policies.
- Creation of job descriptions, person specifications and contracts for all job posts in school under the guidance of the Head Teacher
- Support with the recruitment of staff, under the guidance of the Head Teacher.
- Administer payroll and benefits, and oversee HR records, including the Single Central Record.

Administration & General Management

- Oversee insurance arrangements, contracts, leases, and service agreements under the guidance of the Head Teacher.
- Manage data protection requirements and ensure compliance with GDPR.
- Oversee school policies relevant to business, finance, operations, and compliance.
- Manage the letting of school premises and ensure appropriate agreements and billing are in place, including DBS, licences and insurance.
- To support the implementation of the school's health and safety policies as directed.
- Ensure all safeguarding duties are carried out in line with school policy.

Governance

- Advise the governing trust board on procedural regulations, statutory requirements, and governance best practices.
- Organise meetings, coordinate agendas with the Headteacher & Chairs of Committees, managing all documentation for governors.
- Facilitate effective communication to help governors focus on strategic direction, policy, and financial oversight.
- Maintaining accurate, up-to-date records of the governing body, meeting attendance, minutes and policies.
- Managing governance databases, tracking governor terms of office, and ensuring school websites meet statutory requirements for transparency.
- Supporting the Chair of Governors in the effective functioning of the board and acting as a central point of communication

Community, Stakeholder & External Relations

- Foster positive relationships with auditors, local authorities, insurers, suppliers, and external agencies.
- Support fundraising efforts and identify additional income opportunities.
- Represent the school in relevant professional and regulatory forums.
- To support with any other role commensurate with the level of this post under the guidance of the Head Teacher.

3. Primary Objectives

- Deliver a balanced, well-managed school budget.
- Ensure full compliance with statutory and regulatory requirements.
- Maintain a safe, efficient, and well-managed estate.
- Work together with the Head Teacher and act as a link for Governance
- Oversee effective HR management and a positive staff culture.
- Provide accurate, timely reporting and strategic advice to leaders and Trust board.
- Support long-term sustainability through strong financial and operational planning.

PERSON SPECIFICATION	
Qualifications & Experience	
Strong financial management experience, ideally at senior level.	E
Experience in working as part of a tightly-knit team to implement change.	E
Experience of operational management across multiple functions.	E
Knowledge of employment law, safeguarding compliance, and financial procedures.	E
A willingness to learn and implement new financial systems, under the direction of SLT and Trust Board.	E
An understanding of Governance procedures, regulations and policies in a school with the ability to act as facilitator for the Trust board of Governors.	E
Recognised financial qualification (e.g., MBA, accountancy) or willingness to undertake training (school willing to support with this).	D
Experience in property/estate management or capital projects.	D
Knowledge of charity law, company law, and education-sector compliance.	D
Fundraising or income-generation experience.	D
Skills & Knowledge	
Excellent financial, analytical, and organisational skills.	E
Strong ICT competence and data-management capability.	E
High-quality written and verbal communication skills.	E
Ability to interpret and apply regulations, contracts, and policies.	E
Sound judgement, confidentiality, and resilience.	E
Personal Attributes	
A dedication & ambition to further develop skills	E
Strong leadership and interpersonal skills.	E
Ability to work with strong initiative	E
Ability to work strategically and collaboratively.	E
Motivation, integrity and professional credibility.	E
Ability to maintain boundaries and build trust	E
Ability to work strategically, under the direction of the Head Teacher and Trust Board	E

**Key: E=Essential
D=Desirable**

*Safeguarding statement for person's working in Children's and Adult's Services.
We are committed to Safeguarding and promoting the welfare of all those we serve, as well as complying with best practice in the application of safeguarding. Therefore, as this role*

requires working with Children or Vulnerable Adults a Disclosure and Barring (DBS) check will be required as part of the pre-employment checking process, and rechecking will be required as and when determined by the relevant policy.

An online search of all candidates will be made prior to offer, following 'Safer Recruitment' Procedures