



JOB DESCRIPTION

Job Title: Trust Finance Manager
Grade: PO3-4 (SCP 32-38)
Reporting to: Chief Financial Officer

Job Purpose:

The Finance Manager is a key member of the central finance team, providing professional management of financial services for The GORSE Academies Trust. The post holder is responsible for the management and operation of the budgeting and accounting systems, and monitoring and reporting on financial performance for a portfolio of trust establishments. They ensure the provision of accurate and timely specialist/technical financial advice and information to the executive team, governors, senior leaders, and other trust colleagues, to enable the trust to make best use of its financial resources.

Key Responsibilities:

- To manage budgets of significant financial value for a portfolio of trust establishments as determined by the CFO and assist with the management of other trust establishments as and when required.
- To accurately prepare, analyse and interpret complex financial information including budgets, income and expenditure reports, financial forecasts, and other reports as required by the executive team, governors, senior leaders, and other colleagues or external stakeholders.
- To advise the executive team, governors and senior leaders on the resourcing needs of each trust establishment in relation to current and future financial requirements, cost of new initiatives, scope for efficiencies, sustainability, and ensuring best value in the use of resources.
- To carry out a monthly reconciliation of payroll to the budget modelling software for trust establishments, ensuring the accuracy of all payments including NI, pension contributions, sick pay, maternity, overtime and other, identifying and correcting any errors or omissions.
- To check and authorise the payment of high value financial transactions in a timely manner, for example monthly payments to the payroll provider.
- To be responsible for the monthly budget monitoring and investigation of variances for trust establishments within portfolio and others as required and escalating issues identified as appropriate.
- To produce financial summaries, commentaries, and other related reports for presentation to Local Governing Bodies (LGBs) and attend meetings of those LGBs as required.
- To advise and support academy staff with the requirements for managing public funds and ensure that the Trust Financial Regulations are understood and adhered to.
- To ensure accurate financial records are maintained, and that the trust complies with all audit, accounting and reporting requirements as set by regulatory bodies.
- To prepare appropriate documents for the year end audit file of the trust and liaise with auditors as necessary.
- To implement internal and external audit recommendations as they affect financial activities within the trust.
- To contribute to the development and review of a 3-year strategic business plan ensuring objectives are linked to the overall long term financial plan of the trust.
- To import, check and approve BACS/CHAPS transactions in the banking system to ensure timely payment of suppliers.
- To line manage members of the finance team; conducting appraisal, setting objectives, delegating work, managing performance, and providing development as required.

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- To undertake any duties, consistent with this position assigned by the Board of Trustees, or Executive Team.

Personal Responsibilities:

- To hold positive values and attitudes and adopt high standards of professional conduct in line with the Seven Principles of Public Life (selflessness, integrity, objectivity, accountability, openness, honesty, leadership) and our trust values of Diligence, Integrity, Rectitude and Kindness.
- Carry out the duties and responsibilities of the post, in accordance with GORSE's Health and Safety Policy and relevant Health and Safety Guidance and Legislation.
- Form positive professional relationships, and work in partnership with colleagues throughout GORSE.
- To willingly engage with training as required.
- Treat all aspects of the role with the strictest confidentiality.
- Be aware of and comply with policies and procedures relating to child protection, health, safety and security, confidentiality, equality and diversity and data protection, reporting all concerns to an appropriate person.

Any Special Conditions of Service:

- The post is subject to a satisfactory enhanced DBS background check, relevant right to work documentation, suitable references and a six -month probationary period
- Occasionally there may be a requirement to work off-site and undertake work outside normal office hours to meet the variable nature of workloads and deadlines and to support academy events.
- Contribution to the overall ethos/work/aims of GORSE.
- GORSE operates a No Smoking/Vaping Policy.

We are committed to safeguarding the welfare of children and expect all staff and volunteers to share this commitment. The successful candidate will be subject to full employment checks, including an enhanced DBS disclosure and barring service check. We promote diversity and aim to establish a workforce that reflects the population of Leeds.

Employment is conditional on confirmation of the right to work in the UK – either as a UK or Irish citizen, under the EU Settlement scheme or having secured any other relevant work visa. If you do not have the right to work in the UK and the role does not meet eligibility for sponsorship, please consider carefully whether you meet the eligibility to apply for this position.

Reviewed November 2024

Person Specification

Criteria	Essential/ Desirable
Qualifications	
	E/D
A degree or higher education level qualification in a relevant subject or be working towards.	E
A minimum of 5 GCSEs at grade 4/C and above including English and mathematics.	E
A recognised professional accountancy qualification (CIMA, ACCA, CIPFA).	D
AAT or School Business Management qualification.	D
Knowledge and Skills	
	E/D
Excellent knowledge of budget and financial management systems.	E
Strong IT skills (Microsoft Office) including advanced Excel.	E
Analytical and problem-solving skills and the ability to manipulate, interpret and present complex data.	E
High ethical standards in line with the Seven Principles of Public Life, and an alignment with our trust values of Diligence, Integrity, Rectitude and Kindness.	E
An ability to maintain confidentiality.	E
Accuracy and attention to detail	E
Customer orientated, and able to communicate effectively with a wide range of stakeholders, both orally and in writing	E
Good time management, organisation skills and the ability to prioritise.	E
Able to work independently and as part of a team, delegating as necessary.	E
Ability to lead and motivate staff, setting high expectations of self and others.	E
Commitment to hard work, teamwork and supporting others.	E
Confidence, enthusiasm, flexibility, emotional resilience and responsiveness to change.	E
Present a positive personal image.	E
An interest in the education sector.	E
Commitment to Equality and Diversity	E
Knowledge and understanding of academy/school finance.	D
Knowledge of the requirements for managing public funds, the Academy Trust Handbook and producing statutory returns as required by the ESFA, and company/charity legislation.	D
Knowledge and understanding of pay and conditions for teachers and support staff.	D
Knowledge of safer recruitment and Keeping Children Safe in Education.	D
Experience	
	E/D
At least three years' experience in a senior finance role.	E
Managing and reporting on budgets of significant financial value	E
Presenting financial information, for example management accounts and financial forecasts, to governors and/or senior leaders	E
Exercising highly developed advisory or persuasive skills, to convince others to adopt courses of action they might not otherwise wish to take.	E
Supervisory and/or management experience	E
Working as a member of a team	E
Maintaining accurate financial records using both manual and electronic systems	E
Working under pressure and meeting conflicting deadlines.	E
Producing reports and using data	E
Dealing with complex queries from a wide range of people.	E
Working in partnership with others to deliver work to set deadlines.	E
Providing customer focused services	E
Demonstrating and using own initiative	E
Dealing with and implementing change	E
Experience of working in a finance role within the education sector	D

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Experience of working within financial frameworks and maintaining financial controls	D
Experience of income generation	D
Experience of audit and/or risk management	D
Continuous Professional Development	E/D
Evidence of commitment to Continuing Professional Development	E
Willingness to actively participate in training and development activities to ensure up to date knowledge and skills.	E
Other Conditions	E/D
Enhanced DBS Clearance	E

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