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| **Job Title:** | **School Finance Officer** |
| **Location:** | **Any Lighthouse Schools Partnership location** |
| **Salary Range:** | **JG7 £27,905 - £30,507**  |
| **Reports To:** | **School Finance Support Manager** |

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| **Job Purpose** |
| To support the School Finance Support Manager in providing a range of financial services and support tasks for schools. To work closely with schools within the Trust, assisting them to compile Budgets and with robust and regular management reporting to their Local Governing Boards; To provide support and challenge to the Finance staff, Headteachers and other stakeholders on financial accountability and appropriateness. To have detailed knowledge of individual schools financial performance, understand key issues that may impact the school budgets.To provide first line financial support and challenge to individual schools.As a part of the Lighthouse Schools Partnership (LSP) Central Team to contribute to the development of strategic plans and work proactively towards the aims of the Trust. |

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| **Main Responsibilities and Duties** |
| * To provide support to key stakeholders (Finance staff, Headteachers and Local Governing Boards) in schools in business operations and financial matters, to ensure that they have a clear picture of the financial position of the school and are running the business operations of the school effectively and in line with policies.
* Provide tailored support for the responsible staff in schools joining the Trust to ensure that they can effectively manage their finances and meet the requirements of the academies financial handbook
* Monitor, challenge and support schools to undertake the appropriate monthly, annual and adhoc reconciliations, checks and reviews, (including monthly checklist, fixed asset register) informing the schools and Trustees of any inaccuracies or concerns
* Support schools with budget preparation ensuring that the budgets produced are as accurate as possible and consistent across the Trust
* Analyse submitted budgets by the schools and inform the schools/challenge and Trustees of any inaccuracies or concerns
* Download actual spend data and support schools with budget monitoring, ensuring that the monitoring information produced is as accurate as possible and consistent across the Trust
* Analyse submitted financial monitoring projections by the schools and inform/challenge the schools and Trustees of any inaccuracies or concerns
* To assist with preparation of year end accounts and audits, supporting the schools to process year end tasks effectively and consistently
* Analyse year end outturn position for schools to ensure that any variances to the expected position are investigated and resolved
* Act as the key point of contact for Headteachers, Business Managers/Finance staff and Local Governing Boards in relation to financial and business operations.
* Prepare and submit financial returns to a range of organisations such as the ESFA and RSC
* Provide advice, training and support on financial systems and processes including the preparation of guidance material in all aspects of the role
* Support schools to undertake their monthly payroll checks and reconciliations effectively
* Support schools to act upon the recommendations of internal audit reports in order to improve their financial performance
* Document and communicate, openly and transparently, the outcome of school visits, support and training through shared visit notes.
* To support the School Finance Support Manager to provide financial support to schools with a projected deficit budget, or that require support to comply with the reserves policy
* To develop excellent working relationships with all internal and external stakeholders to contribute to the overall aims of the Trust.
* Provide cover and support for the Finance Officer
* Be an active and effective contributor to the Lighthouse Schools Partnership
* Undertake tasks, projects and initiatives as directed by the Chief Financial Operating Officer and Schools Finance Support Manager in order to support the work of the Central Team
* Provide cover and support for the Finance Officer
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| **Supervision and Management** |
| The post holder is managed by the School Finance Support Manager.The post holder does not have line management responsibility for staff. The post holder is however expected to provide support, advice and training to other finance staff in the Central Team and in schools.Day to day setting of priorities is the post holders’ responsibility. |
| **Problem Solving and Creativity** |
| The post holder will be required to find innovative solutions and advise on a range of financial and budgeting issuesThe post holder will work with changing and challenging deadlines and during busy periods the post holder will need to prioritise their workload. |
| **Dimensions** |
| Lighthouse Schools Partnership is a Multi-Academy Trust of 23 schools across the age range from Nursery to Sixth Form. The Trust includes both community and Church of England schools as well as three Teaching Schools and an English HubThe annual combined revenue budget of the Trust amounts to approximately £40m. The annual combined capital budget of the Trust amounts to approximately £1.5m.  |
| **Key Contacts and Relationships** |
| Daily contact with the Chief Financial and Operating Officer, School Finance Support Manager, Finance Manager, Finance Officer, other members of the LSP Central Team, Head Teachers, Business Managers, other Trust staff, external contractors/suppliers providing goods or services and other external organisations Occasional contact with Trustees, Local Governing Bodies and Local Authorities |
| **Decision Making** |
| How to deploy their time to deliver an agreed programme of work. |
| **Resources** |
| General Office equipment |
| **Working Environment** |
| Any Lighthouse School Partnership location |
| **Special Notes or Conditions** |
| The post holder is subject to the provisions of all child protection legislation, and the Trust’s policies governing staff who work with children and vulnerable adults.The post holder will have the opportunity to make a significant difference to the deliverability of quality education to students across the Trust.  |

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| Name |  |
| Signature |  |
| Date |  |

**PERSON SPECIFICATION**

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| **KEY CRITERIA** | **ESSENTIAL** | **DESIRABLE** |
| **Qualifications and Experience** | * 5 A\*-C GCSE's or equivalent including Maths and English
* Certificate in School Business Management qualification or relevant finance qualification such as AAT
* Demonstration of commitment to on-going professional development
* Minimum of 3 years extensive practical experience of working in a finance environment including:
* Preparation of detailed budgets and forecasts
* Yearend procedures
* Producing management accounts and variance analysis
* challenge and review meetings with budget holders
 | * Part Qualified accountant (CIMA/ACCA/CCAB or equivalent)
* Experience of working in a school, academy or education setting
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| **Knowledge** | * What constitutes quality in the provision of support services
* How to use comparative data and benchmarking to develop best practice and value for money
* Thorough knowledge of GDPR and confidentiality
 | * PSF Financials
* BPS Orovia Budgeting Software
* A good knowledge of school finance operations and the Academies Financial Handbook
* Knowledge of education pay scales, terms and conditions
* Knowledge of keeping children safe in Education
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| **Skills and Abilities** | * Experience of training and developing staff on a one to one or group basis.
* High level accounting, analytical and numerical skills
* Experience in producing monthly management accounts and year end schedules
* Excellent interpersonal skills, able to communicate effectively with a range of audiences
* Ability to work and influence at all levels within and outside the organisation and a recognition of professional boundaries
* Demonstrate good judgement
* Ability to form sound relationships with staff and the wider schools community
* Ability to work proactively to develop strong relationships with other educational establishments, the Local Authority and other Partners
* Ability to deal with difficult situations and resolve conflict
* Ability to motivate self and others with the ability to work independently and as part of a team
* Resilience, enthusiasm, energy and vigour
* Flexibility and adaptability in changing situations
* Reliability, Integrity and Commitment
* Ability to work under pressure and to meet deadlines
* Excellent written and verbal skills
* Ability to produce a range of reports and statistical information
* Strong negotiation skills
* Ability to work flexibly and use own initiative to achieve objectives
* Excellent organisation skills, to be able to prioritise work and meet deadlines and manage expectations of key stakeholders
* Ability to seek out, manage and influence opportunities for continuous improvement and change
* Ability to maintain a positive and professional demeanour
* A commitment to an excellent standard of customer service
* Think creatively and imaginatively to solve problems and identify opportunities.
* Experience in working in a similar role where accuracy and attention to detail are essential
* Demonstrate a high level of computer literacy – highly proficient in Microsoft Excel
 | * Ability to manipulate data and use pivot tables and lookups to analyse data.
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| **Work-related Personal Requirements** | * Ability to work in busy office environment with frequent interruptions
* Take responsibility for own professional development and attend training courses as required to perform duties
* Demonstrate a commitment to the Trust’s vision, aims and ethos, its community and the school improvement agenda.
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