



## Job Description & Person Specification

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**Job Title:** Trust Financial Controller

**Scale:** LTC

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**Job Purpose:**

Provide an effective, compliant and consistently high-quality financial management and reporting service for the Trust through the implementation of robust, measurable systems and processes which maximise the use of resources and deliver best value.

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**Reporting Arrangements**

**Reporting to:** Trust Finance Director

**Accountable for:** Oversight of Trust Financial Processes

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**Main Responsibilities:**

- Preparation of the monthly management accounts and year end forecasts.
- To assist with preparation of the draft budget, the annual financial statements and returns to the DfE and ESFA, adhering to reporting deadlines.
- To review, monitor and advise budget holders regarding their budgets
- To provide guidance and awareness of financial matters and responsibilities, procedures and systems to staff, highlighting improper practice and ensuring observance of legal requirements.
- To develop financial policies and procedures to ensure compliance with the Academy Trust Handbook including the Finance Manual
- To be responsible for, and carry out where appropriate, all accounting procedures and resolve problems, including:
  - the operation of all accounts ensuring monthly reconciliations.
  - ensuring that an asset register is maintained.
  - preparation of invoices and collection of fees and other dues, taking legal action where necessary to recover bad debts.
- Identify and evaluate opportunities for improving value for money.
- To review monthly payroll for accuracy and ensure all HMRC and pension returns are sent according to timescales.
- To coordinate Trust insurance claims monitoring the income due in until the claim settled in full
- To prepare and submit VAT returns

- To ensure all income due to the Trust is promptly invoiced and manage the procedure for credit control of any outstanding debts
- To authorise orders to the value of £5k
- To assist with benchmarking data for the Trust including key financial and operational indicators
- To manage the collation of data from individual schools.
- To prepare Year End schedules to inform statutory accounts preparation
- To liaise with Trust auditors over the annual statutory audit
- To liaise with Trust internal auditors over internal reviews
- To oversee in the implementation of recommendations from the audit and internal scrutiny process
- To attend Trustee meetings and prepare reports for the board as required
- To attend training courses, relating to the post, particularly in the area of financial management.
- To observe the principles of confidentiality
- Reviewing the processes of finance staff to ensure compliance and making recommendations for changes to improve processes
- Managing bank accounts and limits, updating mandates, business card management/ordering and investigating low risk investment opportunities.
- Assist in the development of systems and controls leading on projects to create more efficient processes as the Trust grows.
- Review of Trust Financial Policies and Procedures ensuring they remain compliant with sector guidance.

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### **Trust Responsibilities:**

- Adhere to all Trust policies and procedures.
- Take responsibility for promoting and safeguarding the welfare of all pupils.
- Demonstrate commitment to the Equal Opportunities Policy, to work positively and inclusively with colleagues so that the Trust provides a workplace and delivers services that do not discriminate against people on the grounds of their age, gender, sexual orientation, marital status, race, religion, creed, colour, nationality, ethnic origin or disability.
- Work flexibly in the interests of the service (this may include undertaking other duties provided that these are appropriate to the employee's background, skills and abilities).
- Travel between different sites of the Laurus Trust as required.
- Actively participate in performance reviews at regular intervals in accordance with Trust procedures.
- Undertake training courses organised by the Trust where these will assist in the carrying out of the above duties, develop skills which may be required to fulfil those duties in the future or are required to fulfil legal requirements.
- Refrain from smoking in any areas of Trust premises.
- Behave in a manner that ensures the security of property and resources.
- Demonstrate consistently high standards of personal and professional conduct as defined in The Laurus Trust Code of Conduct Policy.

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### **Safeguarding:**

The Laurus Trust and its affiliated schools are committed to safeguarding and protecting the children and young people that we work with. As such, all posts are subject to a safer recruitment process, including the disclosure of criminal records and vetting checks. The post holder will be required to complete an enhanced Disclosure Barring Service (DBS) Check with appropriate barred list checks, or the equivalent, and must be eligible to work in the UK.

We ensure that we have a range of policies and procedures in place which promote safeguarding and safer working practice across the school. This is in line with statutory guidance Keeping Children Safe in Education and The Education Act, we expect all staff and volunteers to share this commitment.

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### **Core Behaviours:**

It's important for all Support Staff to be able to demonstrate some or all of the core behaviours on a regular/daily basis:

- **Adaptable** - Open to change, to be flexible.
  - **Courageous** - Willing to speak up, offer ideas, challenge the norm.
  - **Hard Working** - Strong work ethic, prepared to go the extra mile.
  - **Inclusive** - Treat others fairly and equally.
  - **Engaged** - Involved/absorbed in your work, participate at all times.
  - **Value** - Add value to your role, your team and the Trust.
  - **Enquiring** - Have an enquiring mind, curious, improve and find solutions.
  - **Motivated** - Pro-active, wanting to achieve goals, willingness to try, can do attitude.
  - **Encouraging** - Giving/offering support and confidence to others, working together.
  - **Navigator** - Providing guidance, leading when necessary.
  - **Tenacious** - Perseverance, never giving up, whatever it takes.
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**Person Specification:**

Attributes	Essential	Desirable
<b>Education and Qualifications</b>	<ul style="list-style-type: none"> <li>• Educated to degree level</li> <li>• Qualified accountant with a recognised body (ICAEW,ACCA,CIPFA)</li> <li>• Evidence of commitment to own CPD</li> <li>• Sound educational background including GCSE's Maths and English (A*-C) or equivalent</li> </ul>	<ul style="list-style-type: none"> <li>• Sector specific qualifications</li> </ul>
<b>Knowledge and Experience</b>	<ul style="list-style-type: none"> <li>• Experience of planning, budget monitoring and procurement</li> <li>• Experience of producing financial/management reports within a medium sized organisation</li> <li>• Ability to implement the principles of best value to maximise the resources of the Trust.</li> <li>• Prior experience in a similar role</li> <li>• Experience of delivering to deadlines and achieving set targets to a high standard</li> <li>• Experience of allocating and prioritising workload effectively to gain maximum productivity</li> <li>• Strong IT Skills including Microsoft 365 product suite</li> </ul>	<ul style="list-style-type: none"> <li>• Experience of payroll procedures</li> <li>• Experience of working in a school or Multi Academy Trust environment or in the Charities sector</li> <li>• Experience of working with confidential information</li> <li>• Awareness of current issues in education</li> </ul>
<b>Skills</b>	<ul style="list-style-type: none"> <li>• Excellent planning and organisational skills</li> <li>• Ability to work independently to organise own workload</li> <li>• Strong interpersonal skills</li> <li>• Highly motivated individual with an innovative approach</li> <li>• Problem solving and analytical skills</li> <li>• Ability to demonstrate engaging oral and written communication</li> </ul>	
<b>Other Qualities</b>	<ul style="list-style-type: none"> <li>• Ability to make effective decisions</li> <li>• Ability to work accurately and methodically</li> <li>• Excellent time management</li> <li>• Ability to remain calm under pressure</li> <li>• Flexible</li> <li>• Good team player</li> <li>• Willingness to undertake further training</li> <li>• Commitment to safeguarding and promoting the welfare of children</li> </ul>	<ul style="list-style-type: none"> <li>• Full driving licence</li> </ul>