



JOB DESCRIPTION

Job Title:	Finance and HR Manager
Job Reference:	SCH141 (LM2); SCH142 (LM5); SCH143 (LM15)
School:	Stanley Green Infant Academy
Salary Grade:	I Grade SCP28-31
Responsible to:	Headteacher
Responsible for:	SCH142 – a team of up to five employees.

Main Job Purpose

- 1) In co-operation with the Headteacher and Governors, give strategic vision and leadership to all aspects of the school's budget, finance, administration and premises management.
- 2) In co-operation with the Headteacher and Governors, lead, operate, maintain and develop the financial and administrative procedures and systems of the school, ensuring that legal and safety requirements with regard to people and property and the function of the school are maintained in accordance with the Academy Trust Handbook.
- 3) Report to the Headteacher to ensure that the school is fully prepared to meet OFSTED criteria and DfE financial obligations.
- 4) Support the Headteacher with the management of the school site and its buildings: their maintenance, development and efficient use.
- 5) Undertake role as Chief Financial Officer (CFO) of school and proactive member of Extended Leadership Team
- 6) Function as line manager for all associated staff.

Main Responsibilities and Duties

Financial Management

- 1) Work with the Headteacher on the preparation of an annual, three- and five-year budgets and business plan, ensuring it is balanced, realistic, and represents an effective use of public funds.

- 2) Assist Headteacher with forecasting future years' budgets, based on the school's estimated funding and trends in expenditure, to enable the headteacher and governors to make strategic, long-term decisions.
- 3) Submit the Draft and Final budgets, other statutory returns, termly budget spend reports, Key performance Indicators and other documents as required for approval to the Headteacher and Governing body, and attend the Finance Committee meetings of the Governing body.
- 4) Provide sound financial advice and reports to the Headteacher, Governors, and senior leadership team.
- 5) Work effectively with auditors and external agencies to ensure financial and auditing systems are compliant and demonstrate value for money, including analysis of comparative benchmarks.
- 6) Manage the day-to-day running of the school budget by providing financial advice and accountancy, arranging and checking insurance, and costing following the school's Value for Money principles and policies.
- 7) To ensure that all financial returns for the DfE, HMRC, local authority and Companies House are compiled according to guidance in the Academies Trust handbook and submitted within statutory deadlines.
- 8) To ensure that the Asset Register and Fixed Asset Register are maintained up to date and that depreciation calculations are accurately monitored for inclusion in the financial year end accounts.
- 9) On behalf of the Headteacher and Governors, submit bids and grants for school improvement projects and additional funding
- 10) Maintain an up-to-date contracts register to ensure effective use of public funds, with regular monitoring with the Headteacher.
- 11) Ensure accuracy and legitimacy of monthly VAT126 claims before submission, safeguarding sound cashflow management.
- 1) Oversee staff responsible for allocating nursery places and submitting claims on the local authority funding portal, ensuring efficient allocation of spaces and timely funding claims

Reconciliation

- 1) Lead and oversee the monthly reconciliation processes ensuring all reconciliations are carried out in a timely and accurate manner and any differences found are investigated and resolved.
- 2) Post and review accruals, prepayments, accrued and deferred income.
- 3) Ensure all invoices are raised in a timely manner
- 4) Ensure all money owed is tracked and collected in a timely manner
- 5) Oversee receipt of all income, both cash, cheques and direct payments, ensuring correct paperwork is received and receipts provided where appropriate.

- 6) Produce month end reports and reconciliations and present to the Headteacher.
- 7) Monitor and manage the general annual grant settlements.
- 8) Ensure transfer between bank accounts are carried out.
- 9) Reconcile monthly payroll figures and liaise with HR/Payroll provider to resolve material errors/discrepancies prior to approval by Headteacher.

Audit

- 1) To lead the interim and year-end audit (internal and external) and preparation of annual accounts in line with statutory financial reporting requirements.
- 2) To prepare financial records for year end, liaising with auditors as required, and ensure financial records are accurate.

Lettings

- 1) To manage and oversee the lettings.
- 2) Issue invoices for payment and oversee the matching of receipts with invoices.
- 3) To administer the lettings account, ensuring money owed is received and processed on the financial system.
- 4) Liaise effectively with letting providers.
- 5) Ensuring providers adhere to the contract, including ensuring the academy meets its obligation i.e. health and safety requirements

Human Resource Management

- 1) Oversee the administration of the recruitment and induction of all staff and work placements.
- 2) Oversee administration of pre-employment checks, ensuring compliance with up-to-date Safer Recruitment, Keeping Children Safe in Education and other guidance
- 3) Oversee and regularly check the Single Central Record, ensuring up to date accuracy and compliance of the 'live document'.
- 4) Assist headteacher during Ofsted visit with presentation of Single Central Record and safer recruitment.
- 5) Oversee administration of payroll information
- 6) Update and oversee distribution of employee handbook
- 7) Support with arranging supply cover for teaching and support staff when directed.
- 8) Oversee administration and monitoring of staff training.

- 9) To complete all monthly and yearly statutory returns for payroll and pension contributions, ONS Surveys and others as required by HMRC.
- 10) To ensure the efficient maintenance of all confidential staff records, recording of absences on all school systems, and accurate recording of information for School Workforce Census returns to the DfE.
- 11) Ensure that the Trust are informed, as necessary, of any HR matters arising.
- 12) Support in all school matters relating to remuneration and payroll, including the monthly reconciliation of salaries, pensions and national insurance contributions.
- 13) Support HR processes as an investigating officer when appropriate.

ICT Management Information Systems

- 1) Promote the use of ICT for administrative purposes
- 2) Liaise with ICT suppliers to obtain and action quotes, as directed by the Headteacher.
- 3) Support Headteacher with responsibility for cyber security and for the security and backup of data.
- 4) Oversee staff responsible for the input of data: staff records, pupil attendance, assessments, free school meal provision etc.
- 5) Oversee staff responsible for updating Nursery allocation of spaces log and the local authority funding portal, ensuring efficient allocation of spaces and timely funding claims
- 6) Take an overview of office systems and procedures to ensure the office works at optimum efficiency, identifying and implementing improvements as required.

Premises Management

- 1) Work with the Trust to develop and implement a premises development plan – short, medium and long term.
- 2) Support Headteacher/Site Manager in ensuring high standards of maintenance and repair of the school is carried out and progress monitored.
- 3) Take necessary action to ensure repairs/ongoing school premises improvement is carried out in a systematic manner.
- 4) Oversee the management of premises, including lettings, in co-operation with the Headteacher.
- 5) Assist with arranging specifications for frameworks or tenders.
- 6) Support with organising and managing the use of external contractors, where necessary.
- 7) Oversee budget management for site maintenance and the contracts register.

Administration

- 1) Safeguarding - Oversee systems and procedures are in place for visitors and volunteers
- 2) Oversee office systems and procedures to develop and ensure the efficient operation of the school office.
- 3) Ensure that pupil-related day-to-day administration tasks are carried out routinely and efficiently.
- 4) Consistently provide support to the admin team, and cover in the event of absence or busy periods.

Other duties

- 1) Undertake such other duties as may be required from time to time commensurate with the level of the post. The particular duties and responsibilities attached to the post may vary from time to time without changing the general character of the duties or the level of responsibility entailed.
- 2) Comply with all decisions, policies and standing orders of the trust and school; comply with any relevant statutory requirements, including Equal Opportunities legislation, the Health and Safety at Work Act and Data Protection.
- 3) Have a commitment to Child Safeguarding, to promoting the welfare of children and young people in accordance with the school's, local authority and DfE agreed policies, procedures and guidance.

Supervision and Management of People

- 1) Lead the Admin Team effectively, supporting and enabling them to carry out their roles effectively.
- 2) Promote positive wellbeing.
- 3) Bring any conduct issues to the attention of the Headteacher.
- 4) Support Starfish Nursery and Admin staff to facilitate efficient place management of pupils, taking into consideration staffing needs.

Knowledge and Skills

- 1) Ability to undertake work of a range of advanced activities applying to more than one function or area of activity, which requires detailed knowledge and skills in a specialist discipline.

Creativity and Innovation

- 1) Work with the Headteacher and Senior Leadership Team to enhance and maximise income streams.
- 2) The post holder is likely to audit, improve or design new office and administration operating policies and procedures to comply with regulations.
- 3) The post holder may also be required to assist in writing specifications and tendering documentation.

Contacts and Relationships

- 1) Contacts will be on a range of subjects: the post holder will need to liaise with a range of contacts and maintain relationships both internal and external to the school. Some authority in the provision of services is required.
- 2) Work alongside the senior leadership team; be responsible for reporting financial information to the Headteacher and Governing Body of the school and giving advice and recommendations based on this information.
- 3) Liaise with contacts within school: with staff, parents/carers, and pupils.
- 4) Maintain contact with external agencies as required.
- 5) Liaise with contractors when on-site at the school and oversee their work, where necessary.

Resources

- 1) The post holder will be responsible for the proper use and safekeeping of ICT equipment and sensitive electronic data.
- 2) The post holder will be responsible for the accurate handling and security of cash and cheques and other financial resources.

LIST OF LOCAL DUTIES

Ethos and values

All members of staff employed by Stars Trust (Stanley Green Infant Academy and Starfish Nursery) will support and promote:

- A love for learning, love for life!
- The vision, values and ethos of the academy and encourage in pupils and colleagues: Kindness; Curiosity; Independence; Teamwork.
- Team spirit.
- Children First
- Positive wellbeing for all.
- High expectations of all staff, pupils and parents to work collaboratively to achieve the best possible outcomes for all within Stars Trust community.
- Establishing effective and positive working relationships setting a good example to others through personal and professional conduct
- A personal commitment to achieving consistently high standards in all aspects of the role.
- The school's IT/e-safety policy; with particular regard to appropriate social networking, other forms of e-communication and cyber security.
- Contribution to the life and success of the school through effective participation in meetings and supporting the self-evaluation cycle for school improvement.
- Have proper and professional regard for the ethos, policies and practices of the academy.
- Take on any additional responsibilities which might from time to time be determined by the Headteacher.

PERSON SPECIFICATION

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ATTRIBUTES	ESSENTIAL	DESIRABLE	METHOD OF ASSESSMENT
Experience	<ul style="list-style-type: none"> Financial management and administration in a school environment Experience of working with senior staff in presenting detailed data in a summarised and clearly signposted manner Leading a team HR administration 	<ul style="list-style-type: none"> Experience working with Iris Financials and Access Budgeting Experience of working with school MIS, particularly Arbor Experience of working in a school with a nursery Experience of sourcing alternative and compliant income streams 	Application form Interview References
Qualifications & Training	<ul style="list-style-type: none"> A-Levels NVQ Level 4 or equivalent in accountancy or school business management Holds membership of a relevant professional body 	<ul style="list-style-type: none"> Honours degree or equivalent Accountancy Qualification 	Application form Certificates Interview
Aptitudes & Abilities	<ul style="list-style-type: none"> Outstanding numeric and accuracy skills Excellent written and verbal communication skills Competent ICT skills Ability to lead and support a team effectively Ability to work independently and as part of a team Excellent planning and time management abilities Well-developed research and analytical/evaluation 		Application form Interview References

	<p>skills, including ability to draw appropriate conclusions from complex information and offer considered recommendations/options to decision makers</p> <ul style="list-style-type: none"> • Ability to draft reports for the Headteacher and senior leadership team • Ability to work effectively under pressure and manage a range of projects and tasks to achieve successful outcomes within fixed timescales • Ability to find innovative ways of problem solving and find new ways of improving services • Diplomatic, persuasive and influencing skills • Ability to handle confidential information with discretion 		
Knowledge	<ul style="list-style-type: none"> • Ability to comply with financial regulations for school and pro-actively support Headteacher with statutory submission of financial/academy information. • Knowledge and experience of setting and monitoring substantial budgets • Able to understand and explain legislative and regulatory information relating to schools. • Knowledge of best practice and procedures for safeguarding children 	<ul style="list-style-type: none"> • Knowledge and experience of setting and monitoring substantial budgets in an education setting 	<p>Application form Interview References Aptitude testing</p>
Attitude / Motivation	<ul style="list-style-type: none"> • Self-motivated • Enthusiastic • Team Player 		<p>Application form Interview References</p>

	<ul style="list-style-type: none"> • Committed to the development and maintenance of good relationships with staff, parents, governors and the community • Promotion of wellbeing • A flexible and adaptable approach • Committed to the CPD of self and others within the school 		
Other Factors	<ul style="list-style-type: none"> • Commitment to Equal Opportunities • Enhanced DBS check 		Application form Interview References DBS process

Prepared by: Human Resources
 Date: June 2025