



Regional Finance Officer

Role Profile and Personal Specification

Job No: RFO01 & RFO02

Job Title:	Regional Finance Officer
Division:	Finance Directorate
Grade Range:	Grade 6 (SCP 18-20)
Salary Range:	£34,416 - £35,448
Hours/weeks:	36 Hours, Full time, 52 weeks
Contract Type:	Permanent
Office Location:	The Beckmead Trust The Artsxchange, 263-269 City Road, London EV1
Line Manager:	Regional Finance Lead

The Beckmead Trust is a growing Multi-Academy Trust that specialise in providing high-quality education for children and young people with special educational needs and those requiring alternative provision. Our mission is to transform lives through inclusive education, unwavering support, and continuous improvement. We are values-led, people-focused, and ambitious for every pupil and colleague in our Trust community.

Main purpose of this Role:

To provide an effective and efficient administrative financial support service to the Executive, Senior Leadership and Regional Finance Leadership Teams for the smooth efficient conduct of the Trust Financial Directorate.

The postholder is responsible for the accurate and timely recording of income and expenditure for designated schools within the Trust.

The Trust Regional Finance Officer plays a key strategic role in management of the accounting operations within the Trust. Reporting to the Regional Finance Lead, the post holder is responsible for robust and accurate recording of daily financial transactions to include income and expenditure. Working closely with the Regional Finance Lead, they are responsible for meeting set month-end deadlines and monitoring the schools' budgets, ensuring detailed information is provided for any overspending. As the Trust mainly manages schools with High needs funding, the post holder is responsible for reconciling expected Income for pupils against Income received from Local Authorities. There is a responsibility to ensure compliance with statutory guidance and Trust Financial policy and procedure and assist all aspects of the internal and external audits. The postholder will work proactively and independently to ensure the provision of accurate and timely data.

KEY DUTIES AND RESPONSIBILITIES

The responsibilities below are indicative of the tasks the RFO will perform and are not exhaustive. The postholder may be expected to take on additional tasks appropriate to the role as they arise.

Communication:

- Managing finance email addresses and assisting schools with the administration of email accounts.

- Resolve queries from suppliers, customers, and schools efficiently. Point of contact for designated schools.
- Training for school administrative staff on systems and procedures, including any new administrative personnel.
- Inform the Finance Directorate Lead or Head Teacher about any changes that impact budget setting and monitoring.

Purchase Ledger Management:

- Ensure the precise and timely processing of purchase orders, invoices, credit /debit card transactions, staff expenses, and other transactions to meet monthly deadlines.
- Overseeing the accuracy of invoice postings to ensure expenditures are correctly allocated to the appropriate cost centres and nominal codes.
- Management of prepaid purchase cards for Trust and school staff.
- Procurement and issue of free school meal vouchers for designated schools.
- Vetting of new suppliers and setting up in finance software.
- Changes to existing suppliers and amending on finance software.
- Dealing with general supplier requests (supplier remittances requests)
- Maintain the contracts register by recording all new contracts.

Sales Ledger Management:

- Prepare sales invoices for pupil funding, including external borough funding and additional Trust income such as consultancy, teaching training, and lettings.
- Handling invoice queries from customers and schools.
- Reconciling the Arbor pupil admission schedules with expected income from Local Authorities
- Liaising with Head Teachers regarding projected pupil numbers and assisting the Regional Finance Lead with these predicted pupil admissions for budget setting
- Reconciliation of monthly income with payment schedules with pupil top-up funds
- Reconciliation of placement funding with DfE annual funding statements

Budget Monitoring and Analysis:

- Assist with final preparation of income and expenditure for period, including inter-school allocations, prepayments and accruals
- Undertake deep dives into income and expenditure variances to provide a narrative for over/underspend to stakeholders, highlighting risks.
- Provide support to the Regional Finance Leads, Finance Controllers and Chief Financial Officer in preparation of draft Management Accounts for meetings with Head Teachers.
- Provide Head Teachers with monthly monitoring reports and supporting narrative based on latest outturn figures and assumptions.
- Undertake deep dives into income and expenditure variances to provide a narrative for over/underspend to stakeholders.
- Provide support to the Finance Directorate Team with due diligence of new schools seeking to join the Trust.
- Work closely with Regional Finance Lead, Financial Controllers and Chief Financial Officer to prepare robust school and/or directorate budgets clearly documenting assumptions and risks.
- Assist in collating information for benchmarking and budget setting
- Assist Regional Finance Leads with schools' budget review and provide budgetary support.

Audit and Financial Accounts:

- Support the Regional Finance Lead with providing accurate year-end accrual and prepayment adjustments, and ensuring they are raised, with supporting documentation to evidence assumptions
- Assist with month end audit preparation.
- Provide support to the Finance Directorate team during year end audit

Collaborative Working

- Provide flexible cover for team members within the finance team when required.
- Participate in related learning, reviews, and ongoing development.

Face-to-Face Attendance & Engagement

- Attend meetings face-to-face as requested by line manager
- Be available in-office as required by the CFO
- Attend Finance Directorate meetings (3x per year) to contribute to strategic planning and reporting.
- Visit schools when needed to support audits, data validation, or reconciliation.

Special Conditions

- Adhere to the Trusts' Code of Conduct Policy
- Willingness to undertake further training as required (for example, completing training for any new finance software systems)
- The ability to work flexibility and ensure that essential tasks are carried out within agreed timetables
- This position requires an enhanced DBS

SAFEGUARDING

The Beckmead Trust is committed to safeguarding and promoting the welfare of children and young people. The highest priority must be given to following the guidance and approaches to safeguard children and follow all safeguarding procedures outlined by the MAT and member schools.

POLICIES

Green Statement:

Seek opportunities for contributing to sustainable development of the borough, in accordance with the Trust's Green Commitment. In particular, demonstrate good environmental practice (such as energy efficiency, use of sustainable materials, sustainable transport, recycling and waste reduction) in management of the service provision.

Data Protection:

- To be aware of the Trust's responsibilities under the Data Protection Act 1984 and GDPR May 2018 for the security, accuracy and relevance of personal data held on such systems and ensure that all administrative and financial processes comply with this.
- To maintain client records and archive systems, in accordance with departmental procedure, policy and statutory requirements.

Confidentiality:

You are expected to treat all information acquired through your employment, both formally and informally, in strict confidence. There are strict rules and protocols defining employees' access to and use of the Trust's databases. Any breach of these rules and protocols will be regarded as subject to disciplinary investigation. There are internal procedures in place for employees to raise matters of concern regarding such issues as bad practice or mismanagement.

Equalities and discrimination:

The Trust has a strong commitment to achieving equality of opportunity in its services to the community and in the employment of people. It expects all employees to understand, comply with and to promote its policies in their own work, to undertake any appropriate training and to challenge racism, prejudice and discrimination. This includes respecting and valuing the different experiences, ideas and backgrounds others can bring to work and to teams.

Health and Safety:

Every employee is responsible for their own Health & Safety, as well as that of colleagues, service users and the public. Employees should co - operate with management, follow established systems of work, use protective equipment where necessary and report defects and hazards to management.

PERSON SPECIFICATION

		Essential	Desirable
Qualifications	Level 4 Qualification (Degree or equivalent) or commensurate experience		•
Experience	Proven track record within a schools finance function	•	
	Experience of working in accordance with statutory regulations and working knowledge of academy financial rules and regulations.	•	
	Experience of assisting with internal and external audits	•	
	Knowledge of the funding, regulatory and legislative environment of academies	•	
	Experience of working in a school, single academy or multi-academy trust financial role or equivalent, with a working knowledge of schools' finance systems		•
	Knowledge of Special Educational Needs and Disabilities (SEND) funding		•
	Commercial awareness and ability to achieve value for money	•	
	Experience with working on varied financial platforms and have strong MS Excel skills		•
Thinking Ability	An analytical thinker who can process complex information quickly and rigorously in order to recommend effective decision making		•
	Can demonstrate sound judgement to undertake complex tasks in a systematic way	•	
	Ability to analyse financial issues and interpret complex information	•	
	Thinks creatively and imaginatively to solve problems and identify opportunities	•	
	Able to demonstrate having planned appropriately for future success	•	
	Strong attention to detail – able to interrogate data and calculations provided by others, and identify key questions and inconsistencies	•	
	Understands rationale for processes and procedures and their role within wider systems of control	•	
Personal Effectiveness	High ethical standards and influencing skills with the ability to engage effectively with all staff across the Trust	•	
	Self-confident with the ability to communicate effectively and tailor communication to different audiences	•	
	Proactive and self-motivated. Able to independently identify areas for investigation and drive things forward	•	

		Essential	Desirable
	Works reliably under pressure to produce timely, accurate information and is willing to do whatever necessary to bring about results	•	