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| PERSON SPECIFICATION | JOB TITLE: Finance Manager | Grade – M5 – M6 (DOE and Qualifications) |
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| Key | E= (Essential) D= (Desirable) A= (Application Form) I= (Interview process) |
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| Qualifications            |   | E | D | A | I |
|---------------------------|---|---|---|---|---|
| 1                         | Qualified or part-qualified accountant actively studying (ACCA/CIMA/CIPFA or equivalent)  | ✓ |   | ✓ | ✓ |
| 2                         | Diploma in School Business Management (or working towards it)   |   | ✓ | ✓ | ✓ |
| 3                         | Evidence of continuous professional development   | ✓ |   | ✓ | ✓ |
| Successful Experience of: |   | E | D | A | I |
| 1                         | Financial management including month-end close, reconciliations and balance sheet control   | ✓ |   | ✓ | ✓ |
| 2                         | Budget planning, financial forecasting, scenario planning and supporting the organisation to deliver a balanced budget.             | ✓ |   | ✓ | ✓ |
| 3                         | Preparing and presenting financial reports a variety of audiences, including variance analysis, key risks and recommendations       | ✓ |   | ✓ | ✓ |
| 4                         | Working effectively in a matrix reporting environment with the ability to manage competing priorities and stakeholder expectations. | ✓ |   | ✓ | ✓ |
| 5                         | Providing financial advice, guidance and challenge to senior leaders  | ✓ |   | ✓ | ✓ |
| 6                         | Ensuring compliance with financial regulations, internal controls and audit requirements  | ✓ |   | ✓ | ✓ |
| 7                         | Financial audit processes (internal and external) and implementing corrective actions   | ✓ |   | ✓ | ✓ |
| 8                         | Procurement and supporting tendering processes to achieve value for money   | ✓ |   | ✓ | ✓ |
| 9                         | Overseeing and being accountable for credit control, ensuring income is invoiced promptly and collected on time.                    | ✓ |   | ✓ | ✓ |

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|--|--|----------|----------|----------|----------|
| 10   | Developing and managing corrective action plans to address budgetary concerns with budget holders and agreed timelines | ✓        |          | ✓        | ✓        |
| 11   | Line management of finance team including performance management and development                                       | ✓        |          | ✓        | ✓        |
| 12   | Using integrated finance systems (e.g. Access, PS Financials, SIMS, Arbor etc.) for operational delivery               | ✓        |          | ✓        | ✓        |
| 13   | Financial forecasting, cash flow monitoring and financial risk management  |          | ✓        | ✓        | ✓        |
| 14   | Working within an educational financial environment, with knowledge of academies and SEN funding                       |          | ✓        | ✓        | ✓        |
| <b>Knowledge and Understanding</b><br>Able to evidence and apply up to date secure knowledge and understanding of: |  | <b>E</b> | <b>D</b> | <b>A</b> | <b>I</b> |
| 1  | Best practice in financial controls, fraud prevention and segregation of duties  | ✓        |          | ✓        | ✓        |
| 2  | Financial regulatory requirements, audit standards and statutory reporting   | ✓        |          | ✓        | ✓        |
| 3  | GDPR and confidentiality requirements in relation to financial data  | ✓        |          | ✓        | ✓        |
| 4  | Cash flow management, working capital principles and treasury considerations   |          | ✓        | ✓        | ✓        |
| 5  | The key financial issues facing schools  |          | ✓        | ✓        | ✓        |
| 6  | Academy trust financial compliance and ESFA/DFE reporting frameworks   |          | ✓        | ✓        | ✓        |
| 7  | School funding mechanisms including high needs, post-16 and census-based income  |          | ✓        | ✓        | ✓        |
| <b>Skills</b>  |  | <b>E</b> | <b>D</b> | <b>A</b> | <b>I</b> |
| 1  | Strong financial analysis, problem solving and risk management skills  | ✓        |          | ✓        | ✓        |

|   |  |          |          |          |          |
|---|--|----------|----------|----------|----------|
| 2   | Ability to produce clear, accessible reports for non-specialist audiences  | ✓        |          | ✓        | ✓        |
| 3   | Excellent communication skills at all levels   | ✓        |          | ✓        | ✓        |
| 4   | Ability to work strategically and to seek and implement creative solutions   | ✓        |          | ✓        | ✓        |
| 5   | Advanced Excel skills and competent use of financial/accounting packages   | ✓        |          | ✓        | ✓        |
| 6   | Ability to handle data and information critically, accurately and effectively                                      | ✓        |          | ✓        | ✓        |
| 7   | Highly effective administrative and organisational skills  | ✓        |          | ✓        | ✓        |
| 8   | Resilience, ability to manage competing priorities and meet strict deadlines                                       | ✓        |          | ✓        | ✓        |
| 9   | The ability to establish effective working relationships at all levels within an organisation and outside agencies | ✓        |          | ✓        | ✓        |
| 10  | Ability to work independently and line manage others effectively   | ✓        |          | ✓        | ✓        |
| 11  | Ability to interpret funding guidance, financial policies and regulatory frameworks                                |          | ✓        | ✓        | ✓        |
| <b>Personal Attributes</b><br>Able to consistently demonstrate evidence of: |  | <b>E</b> | <b>D</b> | <b>A</b> | <b>I</b> |
| 1   | Consistently demonstrate the behaviours expected by virtue of being a person in a position of trust                | ✓        |          | ✓        | ✓        |
| 2   | Reliability, integrity and professionalism, including always maintaining confidentiality                           | ✓        |          | ✓        | ✓        |
| 3   | Being committed to maintaining a healthy work life balance for oneself and that of others                          | ✓        |          | ✓        | ✓        |



Ascendancy  
Partnership  
Trust



|   |   |   |  |   |   |
|---|---|---|--|---|---|
| 4 | Passionate about securing best value from the budget for the education of all pupils irrespective of their ability, or ethnic, cultural or social background. | ✓ |  | ✓ | ✓ |
| 5 | Being suitable to work with children and able to always maintain appropriate professional boundaries between oneself and children and other work colleagues.  | ✓ |  | ✓ | ✓ |
| 6 | A desire to constantly improve own practice/knowledge through self-evaluation and learning from others  | ✓ |  | ✓ | ✓ |
| 7 | Ability to build positive relationships and act as a trusted advisor  | ✓ |  | ✓ | ✓ |