

## Candidate brief for the position of: **Finance Manager**

Application Deadline: 9am on Wednesday 10<sup>th</sup> December 2025

Suitable candidates may be interviewed before the closing date and Inicio Educational Trust reserves the right to withdraw the position if an early appointment is made.



Dear Applicant

Thank you for expressing an interest in the post of Finance Manager at Inicio Educational Trust. This pack tells you more about our Trust, the role and the person we are looking for.



As a Trust, we comprise of eight primary schools and four secondary schools across the London Boroughs of Bromley and Croydon, as outlined on the next page.

Our overarching aim for all our schools is **learning together, inspiring all**. We are committed to **excellence**, having great aspirations for our children and young people, and encouraging them to seek out and take hold of opportunities. Our drive for excellence is supported by our **collaboration** and we are committed to sharing expertise to empower and inspire all individuals in our schools to thrive in a global world. This is underpinned by **inclusion**. We celebrate and respect the diversity in our communities, and we have a shared expectation in everyone to achieve in an ever-changing world.

This is an exciting opportunity for an experienced and qualified professional with drive, ability and creativity who can make a real and direct impact upon on our finance structures and cost efficiencies, helping to shape our Trust's future. We are fortunate to have excellent finance staff across our schools who have finance as either a whole or part of their job description, and as our Trust develops we are keen to develop our finance knowledge and provision.

This post is available now and would suit someone who has experience of driving positive change in schools with a proven track record in finance. It provides a great opportunity for anyone who wishes to utilise their skills, knowledge and experience to positively impact across a larger organisation.

Please complete the application form as fully as possible.

We very much look forward to receiving your application.

Yours sincerely



Terry Millar  
**Chief Executive**

## Our Schools



**BIGGIN HILL**  
PRIMARY SCHOOL



**BULLERS WOOD**  
SCHOOL FOR BOYS



**BULLERS WOOD**  
SCHOOL FOR GIRLS



**CHARLES DARWIN**  
SCHOOL



**CHELSEFIELD**  
PRIMARY SCHOOL



**CHISLEHURST**  
SCHOOL FOR GIRLS



**DARRICK WOOD**  
JUNIOR SCHOOL



**GREEN STREET GREEN**  
PRIMARY SCHOOL



**THE HIGHWAY**  
PRIMARY SCHOOL



**ORCHARD WAY**  
PRIMARY SCHOOL



**TUBBENDEN**  
PRIMARY SCHOOL



**PRATTS BOTTOM**  
PRIMARY SCHOOL

## Position Summary: Finance Manager

### FINANCE MANAGER

**REPORTS TO:** Finance Director (FD)

**LOCATION:** TBC but predominantly Biggin Hill or Chislehurst

**SALARY:** NJC PO3 (£45,750-£49,054) scale dependant on experience and qualifications -

**HOURS:** 36 hours per week (8.00am-4.30pm/8.30am-5.00pm), all-year round (52 weeks)

**START:** February 2026

We are seeking to recruit an exceptional individual to join our Finance team as Finance Manager. The successful candidate will, under the direction of an experienced Finance Director have day-to-day responsibility for the operation of the finance function of a cluster of schools. (the schools).

Ideally, you will be a qualified accountant with experience in a Single Academy Trust or Multi Academy Trust and/or a Further Education setting. You will have a track record of delivering a top-quality service to students, staff and stakeholders. However, part qualified applicants with the relevant experience, who are nearing completion of formal qualifications, will also be considered.

If this sounds like you then please apply below or contact Jill Wyman, Chief Financial Officer (CFO) at [jwyman@iniciotrust.org](mailto:jwyman@iniciotrust.org) for an informal discussion.

Applications are welcomed from suitably qualified candidates with the appropriate skills, vision and desire to work at our Trust, where expectations are high and there is a strong focus on student achievement.

### THE ROLE

- The Finance Manager ("FM") will work closely with the CFO and FD assisting with the schools' finance administration. The FM will be responsible for managing the schools' financial management system; for the day-to-day running of the schools' accounts; providing information to the CFO, FD and Senior Staff for decision-making purposes; and for managing the functions, staff and resources of the schools' Finance Team to deliver the financial services required to pupils, staff and outside agencies. The position is subject to the procedures set out in the DfE Academies Trust Handbook and the Trust's Financial Policies and Procedures Document.

- The FM is expected to keep abreast of changes in financial procedures (e.g. HMRC, EFA, Teachers' Pensions, LGPS, Local Authority) which will affect the operation and management of the schools.
- The FM will be responsible to the FD for the effective management of the financial postings of the schools.
- The FM will assist the CFO and FD with financial compliance and submission of accounting and other returns to external agencies.
- The FM will be a team player with experience of developing teams and exposure to creating positive working cultures.

### **Specific Responsibilities - Financial Duties Daily**

In general, the responsibilities and duties of the post include:

- To work closely with the CFO and FD in developing and managing the schools' annual budget setting process. Analysing and reconciling financial information from finance system for decision-making and budgeting purposes.
- To develop and maintain sound financial systems (including managing the system of cost centres and ledger codes) and controls in line with the requirements of the Academy Trust Handbook.
- To ensure the correct operation of the schools' financial management system to provide clear and correct financial information and using it to process all orders and invoices, including making payments, in accordance with the Trust Financial Policies and Procedures Document
- To work in coordination with the CFO and FD in the preparation of monthly and annual accounts identifying departmental cost codes and inputting the details onto the annual accounts.
- To assist in the monitoring of expenditure against budget for commitment and variance reporting.
- To manage the PO, invoice input, sales invoice and the finance administrator role activities as and when required.
- Line leadership for finance assistants

### **Specific Responsibilities - Financial Duties Monthly**

- To liaise with the SENDCos and various Local Authorities to ensure that due Special Educational Needs and Disabilities (SEND) funding is identified, invoiced, and received on a timely basis.
- To manage and review monthly credit card reconciliation and all other postings including Direct Debits.
- To prepare the bank reconciliation by the agreed deadline.
- To monitor the expenditure and income of cost centres and departmental spending highlighting issues such as areas of overspending and underspending to the CFO.
- To produce monthly VAT returns for submissions; sending them to HMRC; and reconciling the VAT control account.



- To prepare monthly management accounts, cash flow, departmental budget monitoring reports, balance sheets, etc. as required for the Governing Body, including balance sheets, re-forecasts, and key performance indicators where appropriate.
- To oversee the Bursary payments on a monthly basis
- To ensure all government returns are submitted accurately and on time.
- Gift Aid coordination (where applicable) with school Parent-Teacher Associations (PTAs), ensuring all gift aid forms are processed, liaising with and supporting the PTA treasurers

#### **Specific Responsibilities - Financial Duties Monthly**

- To liaise with the internal scrutiny officer, as necessary.
- To administer the voluntary accounts or private funds including liaising with Heads of Department and teachers in charge of journeys.

#### **Specific Responsibilities - Financial Duties Annually**

- To manage the end-of-year procedures for the schools' budgets in preparation of the Annual Report and Financial Statements.
- To lead on the schools' audit process
- To ensure all government returns are submitted accurately and on time.
- To plan, organise and manage own workload to ensure all duties are completed in a timely and accurate manner.
- **Health and Safety**
- To contribute to a safe and healthy workplace by following health & safety instructions and policies.
- To present a positive personal image, contributing to a welcoming Trust environment which supports equal opportunities.
- **Other Responsibilities**
- Be aware of and comply with policies and procedures relating to child protection, health, safety and security and confidentiality, reporting all concerns to an appropriate person
- Contribute to the overall ethos/work/aims of the Trust
- Compliance with the IET Staff Code of Conduct.
- To actively comply with and promote all working policies and procedures.
- All members of the support staff are expected to be flexible and to assist with duties outside their normal area of responsibility from time to time.
- The nature of the work demands that discretion and confidentiality are of utmost importance at all times.
- The duties and responsibilities set out here are not exhaustive and may be changed or added to in the light of subsequent developments and the best interests of the exigencies of the school.

**Person Specification**

<b>Qualifications</b>	<b>Essential</b>	<b>Desirable</b>
Educated to bachelor's level or equivalent (Preferably with accounting options) with Part or full qualification in AAT, CIMA, ACCA, CIPFA or equivalent or qualified by experience	x	
Advanced knowledge of accounting standards and financial legislation	x	
<b>Experience</b>		
Significant experience working in a similar capacity in a finance office in an education environment or other relevant experience	x	
Advanced user of Microsoft Office Suite and accurate data input skills	x	
Advanced understanding of working with accounting and finance systems	x	
Experience of managing high-performance teams	x	
<b>Skills and Attributes</b>		
Exemplary interpersonal skills and emotional intelligence	x	
Excellent communication and organisational skills	x	
Must be highly numerate and have an excellent analytical approach	x	
Disciplined, organised and well presented	x	
Committed and responsible	x	
Ability to work hard under pressure while maintaining a positive, professional attitude	x	
Ability to organise and prioritise workload, work on own initiative and meet deadlines	x	
Commitment to personal career development	x	
<b>Knowledge and Understanding</b>		
Problem-solving	x	
Attention to detail in communication and planning	x	
Knowledge of financial standards, and financial procedures and regulations in schools.		x
Ability to develop good relations with staff and pupils and the wider school community	x	

## Application Procedure

- I. Read carefully all the information about this post.
- II. If you have any questions, or would like to discuss the role further, please contact Jill Wyman in the first instance: [jwyman@iniciotrust.org](mailto:jwyman@iniciotrust.org)
- III. Complete the application form as fully as possible. If there is insufficient room on any section of the form, please provide the additional information on a separate sheet. Please note that your application form will be photocopied for the Selection Panel, therefore clarity is essential. It is important that you do not leave any gaps in your career history – any gaps in employment should be fully explained please.
- IV. Send your completed application form to [HR@iniciotrust.org](mailto:HR@iniciotrust.org)

**Application Deadline: Wednesday, 10<sup>th</sup> December 2025 at 9am**  
**Interviews: Tuesday, 16<sup>th</sup> December 2025**

## Appointment Process

- i. Suitable applications will be shortlisted for interview as quickly as possible.
- ii. If you are successful, you will receive either a phone call and/or email inviting you to attend for interview. It is therefore important that you give us a daytime telephone number and/or an email address that you regularly access so that we can contact you to make the necessary arrangements if you are shortlisted.

If you require any assistance in attending for interview, please let us know the nature of that assistance in good time so that we may make appropriate arrangements.

- iii. Candidates called to interview will
  - usually have an opportunity to meet with members of the department
  - normally be expected to conduct a short task.
  - Attend a panel interview.

## Pre-employment Checks

Inicio Educational Trust is committed to safeguarding and promoting the welfare of children and young people, and an appointment will be subject to satisfactory enhanced disclosure



from the Disclosure and Barring Service. Please note that an enhanced check will reveal all criminal convictions on record, including those that might be considered “spent”.

The successful applicant will also be required to:

- Provide details of two referees who know you in a professional capacity. It is our usual policy to take up references BEFORE interviews where possible. Employment is conditional on these references being deemed satisfactory.
- Provide proof of all relevant qualifications.
- Provide proof of eligibility to work in the UK
- Complete a Medical Declaration and receive fitness to work.

## Policy on Equal Opportunities

The Trust is an Equal Opportunities employer and appointments are based on the applicant’s ability to meet the requirements of the position. The Trust is opposed to any form of discrimination against any individual or group and welcomes the fact that our Trust includes a diversity of individuals from many races and cultures. Behaviour, which is discriminatory on the grounds of race, colour, culture, nationality, gender, sexual orientation, disability, religion, will not be tolerated.



## **Inicio Educational Trust**

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