

Lever Edge Primary Academy

Lever Edge Lane, Bolton BL3 3HP

JOB DESCRIPTION

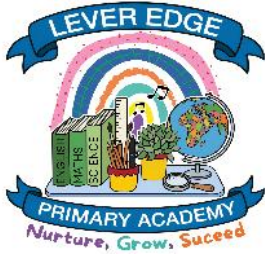
Job Details	
Job Title	Finance Manager (Part-Time – 2 days per week)
Grade	Grade G - SCP 23-27
Primary Purpose of Job	To provide strategic and operational financial leadership for the academy, ensuring effective financial planning, management, monitoring and compliance with statutory and regulatory requirements. The Finance Manager will support the Headteacher and Trustees in maintaining the financial sustainability of the academy and ensuring that all financial systems operate efficiently and transparently.
Responsible to	Headteacher
Responsible for	<ul style="list-style-type: none"> • Management of the academy's financial systems and processes. • Line management and professional supervision of the Finance Officer. • Oversight of purchasing, invoicing, payments and income collection processes undertaken by the Finance Officer. • Ensuring compliance with the academy's financial procedures, internal controls and audit requirements.
Principal Responsibilities	The Finance Manager will provide strategic and operational leadership for the academy's financial management, advising the Headteacher and Trustees on financial policy, planning and long-term sustainability. The role is responsible for preparing and monitoring budgets, producing management accounts, and ensuring effective financial control through the oversight of the academy's accounting systems, including the use of Xero and other academy budget software. The postholder will line manage the Finance Officer and oversee all financial procedures including purchasing, invoicing, income collection, asset management and monthly reconciliations. They will ensure compliance with statutory and regulatory requirements, including those set out in the Academy Trust Handbook, and prepare financial returns for bodies such as the Department for Education and VAT submissions to HM Revenue and Customs. The Finance Manager will also support audit processes, manage the Academy Private Fund, oversee childcare funding and pension reporting requirements, and play a proactive role in identifying and developing additional income streams, grants and funding opportunities to support the academy's ongoing development.

Strategic Financial Leadership	
1.	Advise the Headteacher and Trustees on financial strategy and financial policy.
2.	Prepare financial appraisals for projects and contribute to the development of the academy's long-term financial strategy and business planning.

Strategic Financial Leadership	
3.	Use financial management information to identify trends, highlight areas of relative expenditure and provide advice to the Senior Leadership Team (SLT).
Budget Planning and Financial Monitoring	
4.	Prepare annual estimates of income and expenditure for approval by the Headteacher and Trustees using Xero and the academy's budget management software.
5.	Obtain agreement for budgets and monitor expenditure against agreed allocations.
6.	Provide regular management accounts and financial reports to budget holders.
7.	Report on the financial performance of the academy to the Headteacher and Trustees.
Financial Management and Accounting	
8.	Manage the academy accounting function, ensuring efficient operation in line with agreed procedures and internal controls.
9.	Monitor all accounting procedures and resolve any issues relating to: <ul style="list-style-type: none"> • Ordering, processing and payment of goods and services. • Maintaining an accurate asset register. • Preparation of invoices and collection of fees and other income. • Recovery of outstanding debts, including legal action where necessary.
10.	Reconcile all financial records monthly and provide reports to the Chair of Trustees.
Compliance, Audit and Financial Returns	
11.	Liaise with Internal Auditors and Internal Scrutiny providers, providing all required documentation and implementing recommended improvements.
12.	Ensure compliance with the Academy Trust Handbook.
13.	Prepare financial returns for the Department for Education and local authority within statutory deadlines.
14.	Prepare accurate monthly VAT returns for submission to HM Revenue and Customs.
15.	Oversee the annual Teacher Pensions audit for submission to the Teachers' Pensions.
Academy Funds and Income Management	
16.	Manage the Academy Private Fund, including preparation of annual income and expenditure statements and arranging independent audit.
17.	Oversee the management of Childcare Grant income and undertake eligibility checks for Tax-Free Childcare.
18.	Oversee benefit-related eligibility checks for 2-year-old funding and 30-hour funding children.
19.	Maximise income through academy activities including: <ul style="list-style-type: none"> • Private nursery provision • Sports hall hire • After Academy Care Club • Other income-generating activities.

Strategic Financial Leadership	
Grants, Funding and Contracts	
20.	Act as a point of contact for central and external agencies regarding grant applications, gifts and donations.
21.	Identify and proactively pursue additional funding streams for the academy.
22.	Prepare bids for building and environmental developments (e.g. Access Funds), liaising with the Senior Leadership Team.
23.	Negotiate, manage and monitor contracts, tenders and service agreements.
Financial Governance	
24.	Ensure strong financial controls and compliance with academy financial regulations.
25.	Support Trustees and the Headteacher in maintaining transparent financial governance.
26.	In the absence of the Headteacher, take delegated responsibility for financial decisions in accordance with DfE guidance.
General Duties	
27.	Ensure compliance with relevant legislation, guidance and academy policies.
28.	Undertake training relevant to the role.
29.	Carry out other duties related to premises management as reasonably required by the Headteacher.

The post holder may reasonably be expected to undertake other duties commensurate with the level of responsibility that may be allocated, at the discretion of the Headteacher and to meet the needs of the academy.



Lever Edge Primary Academy

Lever Edge Lane, Bolton BL3 3HP

PERSON SPECIFICATION

Job Details	
School Name	Lever Edge Primary Academy
Job Title	Finance Manager
Grade	Grade G (Point 23 – 27)

Stage One

The minimum essential requirements for the above post are as follows. Please try to show in your application form, how best you meet these requirements. Disabled candidates are guaranteed an interview if they meet the essential criteria.

Skills and Knowledge		Method of Assessment
1.	Strong working knowledge of accounting software (preferably Xero) and financial management systems	Application Form / Interview
2.	Good understanding of financial regulations, internal controls, and audit procedures	Application Form / Interview
3.	Ability to analyse financial data, identify trends, and provide strategic advice	Application Form / Interview

Experience, Qualifications and Training		Method of Assessment
1.	Professional accounting qualification (e.g., ACCA, CIMA, AAT) or equivalent substantial experience in financial management	Application Form / Certificate
2.	Significant experience in financial management, budgeting, and reporting	Application Form / Interview
3.	Managing accounts, reconciliations, and producing management accounts	Application Form / Interview
4.	Line management experience, preferably of finance staff	Application Form / Interview

Professional Attributes		Method of Assessment
1.	Excellent organisational and time management skills, able to prioritise and meet deadlines	Application Form / Interview
2.	Strong attention to detail and accuracy	Application Form / Interview
3.	High level of integrity, confidentiality, and discretion	Application Form / Interview

Interpersonal Skills		Method of Assessment
1.	Effective communication skills, able to present complex financial information to non-financial stakeholders	Application Form / Interview
2.	Able to work independently and proactively within a small team	Application Form / Interview

Desirable		Method of Assessment
1.	Experience of academy or academy finance training or qualification	Application Form / Interview
2.	Experience working in an education or academy setting	Application Form / Interview
3.	Experience preparing statutory financial returns (DFE, LA, HMRC, VAT)	Application Form / Interview
4.	Experience of income generation, grants, and contract management in a academy environment	Application Form / Interview
5.	Familiarity with academy budget software or similar systems	Application Form / Interview
6.	Knowledge of the Academy Trust Handbook and DfE financial guidance	Application Form / Interview
7.	Understanding of funding streams for childcare, 2-year-olds, 30-hour provision, and teachers' pensions	Application Form / Interview
8.	Experience in preparing business cases or financial appraisals for projects	Application Form / Interview
9.	Experience liaising with external auditors, scrutiny providers, and statutory bodies	Application Form / Interview
10.	Knowledge of VAT processes and returns in a academy context	Application Form / Interview
11.	Experience working with boards or committees (e.g., Trustees or Finance Committee)	Application Form / Interview
12.	Ability to foster a positive working relationship with staff, parents, and external agencies	Application Form / Interview
13.	Willingness to work flexibly on occasion, including attendance at evening meetings if required	Application Form / Interview

Stage Two

This will only be used in the event of a large number of applicants meeting the minimum essential requirements. Please try to show in your application form, how best you meet these requirements.

Skills and Knowledge		Method of Assessment
1.	Evidence of continuous development	Application Form
2.	Evidence of managing, organising and maintaining information systems	Application Form

Experience, Qualifications and Training		Method of Assessment
1.	To have experience of using initiative to enhance performance	Application Form

Version Control	
Person Specification prepared by:	Lever Edge Primary Academy
Person Specification updated:	29 April 2026

Core Competencies

These core competencies are considered essential for all roles within this school. Please be prepared to be assessed on any of these during the interview process and, for the successful applicant, throughout the probationary period.

Developing Self and Others

Promote a learning environment to embed a learning culture. Support others to develop their skills and knowledge to fulfil their potential. Actively pursue your own development.

Civil Contingencies

Bolton Council has a statutory duty under the Civil Contingencies Act 2004 to respond in the event of an emergency. If the Emergency Management Plan is activated, you may be required to assist in maintaining key council services and supporting the community. This could require working outside of routine working hours and working from places other than your normal place of work.

Equality and Diversity

Uphold the principles of fairness and the Equality Act 2010 in all undertakings as an employee of the school, including providing a fair, accessible service irrespective of customer's race, religion, gender, sexuality, disability or age.

Customer Care

The ability to fully understand, assess and resolve the needs of all customers including those who present with complex situations, in a manner that respects dignity and expresses a caring and professional image.

Health and Safety

Take responsibility for the health and safety of yourself and others who may be affected by your acts or omissions, and comply with all health and safety legislation, policy and safe working practice, including participating in training activities necessary to your post.

Data Protection and Confidentiality

Ensure that any personal data or confidential data you hold is kept securely and is not disclosed, whether electronically, verbally or in writing, to any unauthorised third party. Follow school policies and procedures on dealing with personal information and information assets, including the Code of Conduct, Information Management, and ICT Acceptable Use. Personal or confidential data should only be accessed or used for school purposes.

Fluency Duty

Should you be required, as a regular and intrinsic part of your role, to speak to members of the public in English, you must be able to converse at ease with customers and provide advice in accurate spoken English, as required by the Immigration Act 2016.

Working Hours

The nature and demands of the role are not always predictable and there will be an expectation that work will be required outside of normal hours from time to time.

Safeguarding

This School is committed to safeguarding and promoting the welfare of children, young people and vulnerable adults and expects all staff and volunteers to share this commitment. Should the role involve working with the above groups, you will be subject to an Enhanced Disclosure and Barred List check by the Disclosure and Barring Service.