

Organisation:	Luminate Education Group
Primary Organisation Supported <i>(only use this field for LEG service member of staff)</i>	Luminate Education Group
Core Job Role:	Finance Officer
Job Title:	Finance Officer
Reports to:	Accounts Receivable Supervisor
Grade	LC3 (A)
Date of compilation:	January 2023

ROLE SUMMARY:

The post holder will provide a customer focussed responsive and quality administrative service whilst ensuring efficient, accurate and timely processing of accounts receivable transactions.

The post holder will work in the Luminate Education Group finance team providing a shared service across the group. The post holder will, at all times, comply with Luminate Education Group financial regulations and procedures and maintain a pro-active and diligent approach to fraud awareness.

SPECIFIC ROLE RESPONSIBILITIES:

1. Create new customer accounts, including for trade customers and students.
2. Raise invoices to customers and processing income received.
3. Process direct debits to ensure completeness of income, dealing with exception reports and all queries as required.
4. Monitor receipts of student loans, providing analysis of that income.
5. Review receipts in bank statements to ensure all income is recognised as appropriate in the accounts receivable ledger.
6. Receive payments from customers, ensuring all necessary procedures are adhered to.

7. Monitor outstanding debt and carry out active credit control by telephone, email and issuing letters to debtors.
8. Liaise with the debt management company regarding overdue accounts.
9. Deal with accounts receivable queries, providing excellent customer service.
10. Assist with financial duties to support other areas of the finance team as required.

GENERAL LUMINATE EDUCATION GROUP RESPONSIBILITIES FOR ALL STAFF:

- Maintain and update knowledge of the subject/professional area and co-operate in any staff development activities required to effectively carry out the duties of the post.
- Comply with safeguarding procedures, including the promotion of the welfare of children and vulnerable adults.
- Comply with all relevant policies and procedures.
- Act with honesty and integrity to maintain high standards of ethics and professional standards.
- Use and promote restorative practice approaches.
- Comply with all legislative and regulatory requirements.
- Promote a positive image of the Luminate Education Group and member organisations.
- Any other duties commensurate with the level of the post, which may be required from time to time.
- Embody our Organisational Culture:

Few rules & clear boundaries

The ability to be creative, within areas of focus.

Ownership & performance

Using our robust business planning model to allow areas to have clear ownership over their vision and remit.

Energy & enjoyment

Fostering an environment that enables our people and learners to be brave, interact and have fun.

Creative & reflective

Always hungry to learn and looking ahead to see what is on the horizon.

Passion & ambition

Encouraging all to think aspirationally, inspiring others to do the same.

Collaborative & responsive

Proactively seeking opportunities to create synergies and positive outcomes for all.

Person Specification

Job Title:	Finance Officer
Department	Finance

The specific qualifications, experience, skills and values that are required for the role are outlined below. You should demonstrate your ability to meet these requirements by providing clear and concise examples on the application form. Each criteria is marked with whether it an essential or desirable requirement and at which point in the recruitment process it will be assessed.

Methods of Assessment:

A = Application Form, I = Interview, T = Test or Assessment, P = Presentation, C= Certificate, MT = Micro Teach

Qualifications and Attainments		
Essential (E) Desirable (D)	Criteria	Method of assessment
E	Q1. A recognised qualification at Level 2 in a relevant discipline, or the ability to demonstrate experience or knowledge of the accounts receivable function.	A / I
E	Q2. Literacy and numeracy at Level 2 or equivalent.	A
Experience and Knowledge		
Essential (E) Desirable (D)	Criteria	Method of assessment
E	EK1. Experience of working in a finance team.	A / I
E	EK2. Able to provide excellent customer service when dealing with people over the telephone, face to face and in writing.	A / I
D	EK3. Familiar with Agresso Business World finance package or a comparable finance system.	A / I

E	EK4. Experience of using Microsoft Office systems and databases (Word, Excel, Outlook).	A / I
E	EK5. Experience of working with high volumes of data with a proven record of attention to detail.	A / I
D	EK6. Experience of raising invoices and processing income from customers.	A / I
D	EK7. Experience of credit control.	A / I
Skills and Competencies		
Essential (E) Desirable (D)	Criteria	Method of assessment
E	SC1. Relates effectively to others, both one to one and in teams, being effective in giving and receiving messages both face to face and in writing.	A / I
E	SC2. Highly organised with the ability to work to demanding deadlines and deliver outcomes in an accurate and timely manner.	A / I
E	SC3. Ability to create new ideas and perspectives, see possibilities and challenge established practices in constructive ways.	A / I
E	SC4. Ability to cope with continuous and complex changes, to be flexible and to handle high levels of uncertainty.	A / I
E	SC5. Ability to exercise absolute integrity in respect of confidential matters and to ensure that any specified procedures for ensuring the security and confidentiality of information are always maintained.	A / I
Behavioural, Values and Ethos		
Essential (E) Desirable (D)	Criteria	Method of assessment
E	B1. Support and promotion of equality, diversity and inclusion	A/I
E	B2. Promotion of a safe environment for children, young people and vulnerable adults to learn in	I
E	B3. Commitment to the PREVENT agenda	I

E	B4. Commitment to professional standards	I
E	B5. Commitment to restorative practice approaches	I