

**The
Workforce
Development
Trust**

Finance Team Leader

Job description

Job Title	Finance Team Leader
Department	Finance
Reports to	Financial Controller
Location	Bristol, with hybrid working available
Pay Scale	£33,000 - £36,500k
Contract	Permanent
Hours	Full Time – 37.5 hours per week

The Workforce Development Trust

The Workforce Development Trust is a not-for-profit organisation that provides services that support employers to develop skilled, sustainable, and efficient workforces in the UK and abroad. We operate via our five brands; Skills for Health, Skills for Justice, SFJ Awards, ICQ Awards and People 1st International, which deliver specialist, targeted skills interventions to support a variety of frontline public services.

Job summary

This is a Bristol Office based role and a great opportunity for someone looking for a hands-on role within a finance team to gain experience and manage a team. The post holder's primary responsibilities will be to manage the transactional finance team, overseeing the accounts receivable, accounts payable, credit control and other controllership team activities such as but not limited to bank reconciliations and income and expenditure contracts.

The post holder is responsible for the provision of a professional and efficient range of finance support as part of the Finance Team, reporting into the Financial Controller and ensuring that the service requirements are complied with accurately and on time and are delivered in a professional, customer focused way.

The post holder will be responsible for ensuring that financial information is processed in accordance with the Financial Control Framework, providing advice as required.

Key responsibilities

- Manage the accounts payable, accounts receivable and credit control team for the business. Overseeing that the functions run smoothly and being the first point of contact for the team and the business in these areas. This is for all the businesses within WDT, involving 2 separate systems.
- Reviewing Aged Debtors monthly and assisting with credit control and taking ownership for any debts that need to be escalated.
- Managing that sales invoices are raised accurately and on time.
- Reviewing regular supplier payment runs, ensuring invoices are processed accurately, are in line with contracts and paid on time.
- Manage the processing of employee expenses for payroll each month, reviewing to ensure they are inline with policy.
- Manage the credit cards for the business ensuring they are used within policy and all receipts received.
- Process FX revaluation in the Finance System each month.
- Oversee bank accounts for the business, reviewing balances and managing transfers.
- Income Contracts – Be the main contact for the raising and issuing of income contracts for the business, responsible for following up with customers for signature and Purchase Order numbers and maintaining an accurate register of all income contracts to ensure all income is being captured and invoiced, working closely with the Sales Team.
- Expenditure Contracts – Oversee the expenditure contracts process, ensuring contracts are issued timely, comply with IR35 and are always in place where necessary.
- Feedback any issues to the Financial Controller.
- Cover for other members of the Finance Team as required for leave, etc, for example Accounts Payable/Receivable.

Financial Governance

- Involved with compiling and assisting with the annual audit process.

Person specification

Criteria	Essential	Desirable
Education and qualifications		
Educated to A Level standard or equivalent demonstrable knowledge and experience gained in a Finance Department	X	
AAT Qualified		X
Knowledge		
Up to date knowledge and understanding of best financial practice.	X	
Experiences		
Advanced Microsoft Office experience		X
Experience of using Finance Systems	X	
Experience of developing effective working relationships with internal and external stakeholders	X	
Skills and abilities		
Strong interpersonal skills, with the ability to build positive professional working relationships with managers, employees and external stakeholders	X	
Proactive, organised and can work on own initiative as well as being a team player	X	
Able to deliver consistent detailed information that is reliable and accurate	X	
Proven ability to meet deadlines and work under pressure	X	
Ability to analyse, investigate and resolve financial queries and discrepancies. Must be able to balance the detail with the bigger picture	X	
Ability to be mobile across the UK	X	

Job Description Completion

Name	Verity Sheehan
Job title	Financial Controller
Department	Finance
Date	3 rd February 2026

All job descriptions are subject to review. All post holders are expected to be flexible and prepared to carry out any similar or related duties that do not fall within the work outlined. The line manager, in consultation with the post holder will undertake any review.

Safeguarding

The Workforce Development Trust Ltd are committed to safeguarding and promoting the welfare of children, young people and vulnerable adults and expect all employees to share this commitment.

Equal Opportunities

The Workforce Development Trust Ltd are committed to eliminating unlawful discrimination and promoting equality of opportunity. Every employee has a personal responsibility to:

- Ensure their behaviour is not discriminatory.
- Does not cause offence.
- To challenge the inappropriate behaviours of others.
- Adhere to the Equal Opportunities policy.

Health and Safety

Under the provisions contained in the Health and Safety at Work Act (1974), it is the duty of every employer to:

- Take reasonable care of themselves and for others at work.
- To co-operate with The Workforce Development Trust Ltd as far as is necessary to enable them to carry out their legal duty.
- Not to intentionally or recklessly interfere with anything provided, including personal protective equipment for Health and Safety or welfare at work.

The Workforce Development Trust Ltd will take all reasonable practical steps to ensure your health, safety, and welfare whilst at work. If employed, you must familiarise yourself with the Health and Safety policy and Fire Safety rules. It will be your legal duty to take care of your own health as well as that of your colleagues.

Confidentiality

Within this role there will be a need to use or be party to confidential information. The employee may not disclose any information of a confidential nature relating to The Workforce Development Trust Ltd or in respect of which The Workforce Development Trust Ltd has an obligation of confidence to any third party other than where you are obliged to disclose such information in the proper course of your employment or required by law.

The unauthorised use or disclosure of personal information no matter whether in verbal, written, or electronic format, or through negligence, is regarded as misconduct. Employees are expected to act with integrity both inside and outside the workplace.

Data Protection

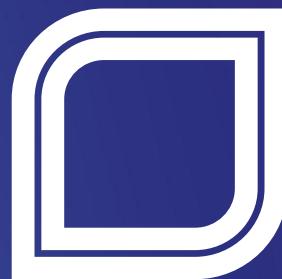
If you apply for a position with the Workforce Development Trust, we will use the information you provide to assist in the recruitment and selection process. Under GDPR, the general information that you supply about yourself is known as your personal data and information about any criminal convictions, ethnic origin, and health, amongst other things, is referred to as 'sensitive personal data'.

The Workforce Development Trust takes the security of your data seriously, and will not share your data with third parties, unless your application for employment is successful and it makes you an offer of employment. The Workforce Development Trust will then share your data with former employers to obtain references for you, employment background check providers to obtain necessary background checks and, where necessary, the Disclosure and Barring Service to obtain necessary criminal records checks. The Company has a legitimate interest in processing personal data during the recruitment process and for keeping records of the process. Processing data from job applicants allows the Workforce Development Trust to manage the recruitment process, assess and confirm a candidate's suitability for employment and decide to whom to offer a job. The Workforce Development Trust may also need to process data from job applicants to respond to and defend against legal claims.

Your information may be shared internally for the purposes of the recruitment exercise. This includes members of the HR team, interviewers involved in the recruitment process, managers in the business area with a vacancy and IT staff if access to the data is deemed necessary. We will hold details of all applicants until the post applied for is filled. After which, if the candidate is unsuccessful, all documents held will be confidentially disposed of, both electronically and physically. Data will not be held for any longer 3 months of receiving an application. At the end of that period, your data will be deleted or destroyed. If you wish for your data to be destroyed before this period, you may contact the HR department and request for your data to be deleted. If your application for employment is successful, personal data gathered during the recruitment process will be transferred to your personnel file and retained during your employment.

Other Employment

You may not without prior permission in writing of The Workforce Development Trust Ltd, be employed or otherwise engaged in any other business, trade, or profession, either directly or indirectly in any capacity whatsoever.



The Workforce Development Trust

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