

# Finance Manager

**Salary:** £16,915 - £18,343

**Closing date:** Wednesday 21st June 2023 at 9am

**Interviews expected to take place:** w/c 26<sup>th</sup> June 2023

**Start date:** September 2023 or earlier



**Grow together**

**Excel together**

**Learn together**

## THE TRUST

# When schools collaborate, incredible things happen.

**Together Learning Trust** is a thriving local group of six schools, three secondary and three primary, inspiring over 5300 young people in Calderdale and Kirklees. We are driven by a shared commitment to providing magical learning experiences for all our children and a belief that all of them can achieve great things.

Exceptional achievement stems from developing world class teaching and learning. Creativity is the core of our values. Our staff are amazing, in both the relationships they forge and the incredible range of opportunities they make possible. We get great results, but we give and expect so much more. We are shaping a generation of future global citizens with the character they need to succeed; with the integrity and commitment to excellence that will enable them to thrive.

Together Learning Trust schools are wonderful places to work. We value and support our team across all our schools, and recognise the ideas, experience and expertise of our staff. Being part of the Trust opens up new opportunities for staff development. The Trust schools work closely together to identify and then implement the best school improvement strategies across its schools. Our aim is to grow great people and talent.

We cherish our staff, support their wellbeing and enable them to flourish. Being part of Together Learning Trust feels special due to the unique nature of the schools and the opportunities it brings for staff, students and communities to collaborate. For everyone involved in our Trust our mission is simple. To **Grow, Excel, and Learn Together**.

What could we do, together?

**DAVID LORD, CHIEF EXECUTIVE OFFICER**



*"I believe that the support that schools can provide each other cannot be underestimated. Being part of the Together Learning Trust enables our schools to continue to flourish and develop within a supportive school focused community, where the expertise of those who have a hands on understanding of our children will lead the way forward."*

**- LIZ WOODFIELD, HEADTEACHER,  
MELTHAM MOOR PRIMARY SCHOOL**

EXPLORE MORE



[www.togetherlearningtrust.co.uk](http://www.togetherlearningtrust.co.uk)



## THE SCHOOL

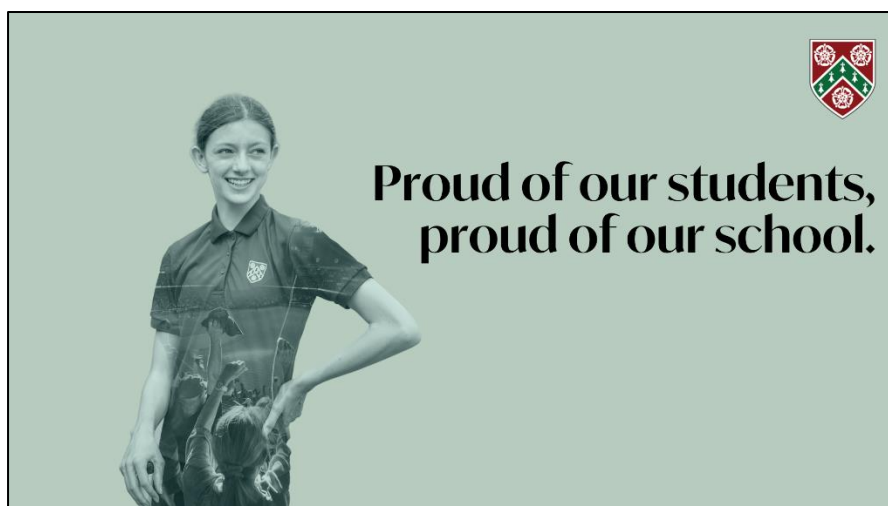
We are proud of the high quality of the education we offer here. We are traditionally one of the highest performing schools in the region and this is directly attributable to the hard work and dedication of everyone who works here. We want all of our children to be the best that they can be and so there is a continual drive to develop and improve as professionals. As Ofsted stated following our last inspection: *"Pupil outcomes are good because teachers have high expectations of what children can achieve and plan interesting tasks that engage pupils in their learning."*

But these crucial years of adolescence are more than just about passing examinations. The world is changing more rapidly than any one of us can predict, and if our children are to thrive in the world, they will need to develop a set of personal skills and qualities along with their academic qualifications. They will need a questioning mind, perseverance and resilience. They will need to be able to adapt and be flexible. They will need imagination and creativity, self-discipline and independence, compassion and a sense of their responsibilities towards other people. These attributes are hard to measure but equally important, and we see it as our duty to ensure our students develop these skills in conjunction with their academic progress.

We are nationally recognised for our sporting achievements and have a proud and enviable record in music, technology, drama and the arts.

Honley High is an excellent school and we are always aiming to develop, as our school motto stated when our doors opened over 90 years ago – 'we strive for the highest'. We place the interests of the child at the centre of everything we do and we will continue to improve and expand the opportunities that we offer our young people.

We are looking for an extraordinary individual to join our school and really make a difference in the lives of the young people in our care.



## THE JOB

# Finance Manager

If you offer strong accounting and financial experience, this position offers an exciting opportunity for an essential role at the centre of our school. This is an opportunity to apply your excellent financial skills in a role which supports children, young people and our school communities.

You will be part of passionate associate team who are supported in an inclusive and friendly environment. You will play an essential part in the preparation, monitoring and reporting of budgets. You will need to be self-driven and want to deliver the best service. It is important that you can demonstrate a solution focused attitude, maintain a positive outlook and work well in a team.

This will be a diverse, busy role; an exciting challenge for someone with a financial background who has the ability to focus on building strong professional relationships.

### What will you get in return?

- Access to our Employee Assistance Programme to provide practical and emotional support <https://www.educationsupport.org.uk/>
- Automatic enrolment to the West Yorkshire Pension Fund
- Staff development through appraisal and CPD
- Term time working with flexibility on days to be worked
- Access to a canteen
- Cycle to Work Scheme
- Great transport links – Honley Train Station is across the road
- Free onsite car parking
- Collaboration with Trust colleagues in similar roles
- Working as part of a creative and supportive team who want the best for all of our students

### What the role involves in a nutshell:

- Budget setting, monitoring and reporting
- Preparation of staffing budgets and payroll checks
- Procurement, Contracts and SLA management
- Year end, annual and audit procedures
- Contribute to the school's strategic finance plan

If our school sounds like a place in which you could really make a difference, then we'd love to show you around and tell you more about our wonderful school.

## JOB DESCRIPTION

# Finance Manager

<b>Responsible to:</b>	Business & Compliance Manager
<b>Responsible for:</b>	Finance Assistant
<b>Band/Salary</b>	H scale points 25-28 22 hours per week, term time Plus 10 days
<b>Main Purpose of the role</b>	<ul style="list-style-type: none"><li>• Accurately set, monitor and report on whole school budgets, in line with the strategic plan of the school and the Trust</li><li>• Manage the staffing budget &amp; undertake monthly payroll checks</li><li>• Manage the day-to-day financial activity of the school, including ordering, invoicing &amp; BACs processing, bank reconciliation, income, procurement.</li><li>• Train staff to ensure adherence to the Financial policies and procedures of the school and Trust.</li><li>• Produce monthly financial management reports to the Business and Compliance Manager and Trust central team.</li><li>• Management of the small Finance Team</li></ul>
<b>Main Duties &amp; deliverables</b>	<p><b>Budget setting, monitoring and reporting</b></p> <ul style="list-style-type: none"><li>• Work with the Business and Compliance Manager and CFO on budget preparations using the Trust's Budget Software.</li><li>• Input agreed budgets to the schools accounting system</li><li>• Monitor cost centres and liaise with budget holders to ensure budgets are managed correctly</li><li>• Prepare monthly management reports for the Headteacher, governors and the Trust</li><li>• Complete month end reconciliations in line with Trust procedures, including bank reconciliations and control account reconciliations</li><li>• Work with Headteacher, Business &amp; Operations Manager and CFO of the Trust to ensure budgets are achievable and identify potential variances and actions required to address these variances</li><li>• Discuss the financial reports on a monthly basis with the Headteacher, Business &amp; Operations Manager ensuring reports are accurate and fit for purpose.</li><li>• Provide timely information to assist in the compilation of the Consolidated accounts of the Trust</li><li>• Contribute to the school's strategic finance plan</li><li>• With the support of the Business &amp; Compliance Manager carry out Financial Benchmarking on an annual basis</li></ul> <p><b>Staffing Budget &amp; Payroll Checks</b></p> <ul style="list-style-type: none"><li>• Prepare the staffing budget using the Trust's budget software in conjunction with the Business &amp; Compliance Manager. Monitor the staffing budget on a monthly basis taking into account any changes in contracts during the year.</li><li>• Assist with changes to staff contracts and timely information given to the schools payroll provider.</li><li>• Checking and processing additional hours claims for payroll</li><li>• Checking payroll reports, identify variances and completing payroll journals</li><li>• Check the BACs payment for all payroll transactions on a monthly basis, in</li></ul>

readiness for authorisation by Business & Compliance Manager and Headteacher

**Routine Financial activity including Procurement, Contracts / SLA Management**

- Overseeing the checking and posting of invoices & transactions for accuracy, ensuring separation of duty
- Ensure VAT is correctly accounted for
- Responsible for ensuring that the Trust procurement procedures are adhered to for all financial transactions, ensuring that budget holders are aware of the correct procedures
- Ensure payments to suppliers are completed on a timely basis
- Manage and assist the Finance staff to ensure that all the financial procedures of the school are carried out efficiently and effectively
- First point of contact for purchase ledger queries
- Ensure systems are in place to enable all income owed to the school is billed and collected in a timely manner
- Where required carry out journal transactions
- Work with and provide information for the Trust CFO and Business/Operations Manager to improve central procurement and contract management
- Ensure Trust procurement procedures are followed at all times This includes obtaining value for money on all contracts and procurement
- Carry out IR35 checks for self employed people when required
- Maintain a register of contracts & service Level Agreements (SLA) which details value, expiry date and cancellation terms. Inform key staff when contracts are expiring

**Other Duties**

- Ensure that the Free school Meal register is updated regularly on the MIS system
- Ensure adequate banking / cash collection arrangements are in place
- Ensure that the Fixed Asset register of the school is updated annually for additions and disposals, ensure all disposals are authorised and recorded
- Ensure journal recharges are carried out on a regular basis, such as photocopying recharges
- Monitor grant expenditure as required by the conditions of the grant and ensure all grant income is collected
- Assist with the implementation of new finance systems for a smooth transition if required.
- Ensure that the school adheres to the Academy Trust Handbook in relation to all financial matters.
- Assist the Schools Educational Visit Coordinator and departments to ensure all trips are thoroughly costed
- Ensure staff understand the procedures for trips and that payments have been set up by the finance team
- Working with our Health and Safety Adviser and EVAC, assist staff in using EVOLVE making sure risk assessments are put on in a timely fashion and are fit for purpose
- Recruitment, development and performance management of the finance team, setting targets and monitoring workload.

	<p><b>Year End/Annual procedures</b></p> <ul style="list-style-type: none"> <li>• Prepare academic year end forecast outturn positions and financial year end forecast outturn positions for the CFO.</li> <li>• With assistance from Business and Compliance Manager prepare the year end accounts ready for consolidation into Trust account, including control accounts.</li> <li>• Keep a register of all assets which are required for depreciation purposes.</li> <li>• Produce all the documentation required by the auditors.</li> <li>• Assist or prepare annual submission of grant returns.</li> <li>• Assist with preparation of the annual Workforce census return</li> </ul> <p><b>Audit and Financial Procedures</b></p> <ul style="list-style-type: none"> <li>• Be the main point of contact for both internal and external audit visits and ensuring that all relevant information is provided</li> <li>• Take responsibility for ensuring that audit recommendations are implemented and report to Business and Compliance Manager any concerns</li> <li>• Attend the Trust business and Compliance Team meetings when required</li> </ul> <p><b>Deputising for Business and Compliance Manager</b></p> <ul style="list-style-type: none"> <li>• With the support of the Trust central team, deputise for the Business and Compliance Manager where appropriate in their absence</li> </ul>
<p><b>Expected Behaviours</b></p>	<ul style="list-style-type: none"> <li>• Undertake other duties and responsibilities of an equivalent nature as may be required by the line manager, including ad hoc support during out of academy hour events, such as governor's meetings, open evenings. Your main working hours will be during school hours.</li> <li>• Be able to work collaboratively as part of a team</li> <li>• Develop positive working relationships with colleagues</li> <li>• Communicate clearly, respectfully and professionally with pupils, parents, colleagues and visitors</li> <li>• Work with his or her line manager to develop and implement a professional development plan</li> <li>• Use feedback and personal reflection to improve his or her own working practices</li> <li>• Where relevant, maintain first aid accreditation</li> <li>• Understand how the role supports the quality of teaching and learning</li> <li>• Understand the roles of external agencies and how to work with them as required</li> <li>• Follow all processes for the handling and banking of money meticulously</li> <li>• Know, understand and follow all procedures for the management of the schools finances, if working on financial matters</li> <li>• Use IT hardware and relevant software packages efficiently and effectively as required to fulfil your role.</li> <li>• Retrieve and share the various types of information required by the post holders specific role</li> <li>• Be able to competently use items of office equipment, such as the photocopier, and keep up to date with developments and changes to such equipment</li> <li>• Maintain filing systems, (both paper and electronic), efficiently and in accordance with current systems and processes</li> <li>• Ensure that documents are prepared and data is entered into IT systems accurately and on time</li> <li>• Answer telephones promptly and with a respectful and professional manner</li> <li>• Be familiar with all policies and procedures that are relevant for the role</li> <li>• Know where to get help and support</li> <li>• Know the limits of the role and when to refer people or issues elsewhere</li> <li>• Maintain confidentiality at all times</li> <li>• Understand your role in safeguarding and act on any safeguarding issues in</li> </ul>

	<p>accordance with school procedures</p> <ul style="list-style-type: none"> <li>• Maintain a safe working environment for yourself and other including the completion of risk assessments</li> <li>• Undertake stocktaking and ordering of materials and equipment as required</li> </ul>
<b>Other specific duties</b>	<p>Whilst every effort has been made to explain the main duties and responsibilities of the post, each individual task may not be identified. Employees will be expected to comply with any reasonable request from the Chief Executive Officer and Headteacher/Headteacher to undertake work of a similar level that is not specified in this job description.</p> <p>This job description is current at</p> <p>the date shown. It will be reviewed at least annually and, in consultation with you, it may be changed by the Chief Executive Officer or Headteacher/Headteacher to reflect or anticipate changes in the job commensurate with the grade and job title.</p>
<p>We are committed to safeguarding children, young people and vulnerable adults. All staff and volunteers are expected to behave in a way that supports this commitment and are subject to an enhanced DBS check. Please be aware that <b>it is an offence to apply for the role</b> if you are barred from engaging in regulated activity relevant to children.</p>	



## PERSON SPECIFICATION

# Finance Manager

To be assessed through application, reference and interview.

CRITERIA	ESSENTIAL	DESIRABLE
<b>Qualifications</b>		
Accounting Qualifications e.g. AAT, CIMA,ACCA,ICAEW, etc (Note: Professional experience in a similar role will be seen as equivalent)	✓	
Qualified to degree level		✓
Good general education, including GCSE grade C or equivalent in Maths	✓	
<b>Experience</b>		
Experience in using Accounting Software packages	✓	
Experience in using Excel and other Microsoft packages	✓	
An excellent track record of recent, relevant professional development		✓
Experience of Managing staff		✓
Evidence of Good Financial Practice	✓	
<b>Skills and Abilities</b>		
Skills to motivate and lead others	✓	
Have the vision to plan the way ahead and get things done	✓	
Excellent organisational skills	✓	
Ability to manage and lead a team	✓	
Sound Knowledge of good Accounting Practice	✓	
High level of Confidentiality	✓	
Efficient Record Keeping	✓	
Build relationships with students, colleagues and parents and external agencies	✓	
Ability to communicate to a range of audiences	✓	
Efficient administrator	✓	
Demonstrate good judgement	✓	
Think creatively and imaginatively to anticipate, identify and solve problems whilst under pressure	✓	
<b>Personal Attributes</b>		
Good up to date knowledge and skills	✓	
Good ICT Skills	✓	
Professional	✓	
Ability to work in a team and get the best out of people	✓	
Achieve challenging professional goals	✓	
Determination to succeed and have the highest possible expectations of self and others	✓	
Ability to work under pressure	✓	
Sensitive to the needs of others	✓	
Supportive	✓	
Sense of Humour	✓	
Vision, imagination and creativity	✓	

A large group of children in a school hall, many with their hands raised in the air, suggesting an assembly or a group activity. The children are wearing school uniforms, and the background shows a typical school environment with metal railings.

## HOW TO APPLY

# Say yes to new adventures.

Could we be a good fit for each other? If you're ready for a new challenge, please apply by completing our application form and returning it to [recruitment@togetherlearningtrust.co.uk](mailto:recruitment@togetherlearningtrust.co.uk) by the closing date.

## SAFER RECRUITMENT

We are committed to safeguarding children, young people and vulnerable adults. All staff and volunteers are expected to behave in a way that supports this commitment and are subject to an enhanced DBS check. Please be aware that it is an offence to apply for the role if you are barred from engaging in regulated activity relevant to children. If you are shortlisted for interview, we will undertake an online public search in line with guidance from the Department for Education and Keeping Children Safe in Education 2022.