



### **Trust Finance Assistant**

**Closing Date: Tuesday 30th August 2022, 9am**

**Start Date: As soon as possible**

### **Recruitment Information Pack**

**Coast & Vale Learning Trust**

**Fieldstead Crescent, Scarborough, YO12 6TH**

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Dear applicant,

Coast and Vale Learning Trust is a growing family of schools located on the beautiful Yorkshire Coast. The Trust was founded by Scalby Secondary School but has grown over the last few years to include Newby and Scalby Primary School, Friarage Primary School and the Scarborough University Technical College (SUTC) in Scarborough, Lady Lumley's Secondary School in Pickering, and Filey School in Filey.

Our ambition is to continue to welcome new schools into our Trust where we can add capacity, resources, improvement and make sure all our young people have access to the very best education.

As a Trust we have added to our central team which includes our Chief Operating Officer, Trust Finance Services Manager and school improvement colleagues working within our lead schools.

Our Trust is currently based at Scalby School in Scarborough with both our founding secondary and primary schools being judged 'good' by Ofsted. Our success in making sure that our staff are our greatest resource, with ongoing investment into our teaching and support staff teams has placed us in a good position to meet current educational challenges.

Coast and Vale Learning Trust aims to improve education in the locality through establishing coherent and collaborative practice across schools and other educational institutions in the area.

**In seeking to realise its mission statement and achieve its strategic objectives, the Coast and Vale Learning Trust board are committed to:**

- The principle of meaningful educational partnership between primary and secondary schools.
- Expanding the number of schools in the MAT where this enhances the education of youngsters already under the care of the Trust and can realistically improve it in the joining school.
- Sustainable and measured growth as a Trust.
- Collaborative working with other stakeholders and institutions for the benefit of local youngsters whether they are in the Trust or not.

## **Working For Us:**

Choosing where to work and who to work for is one of the vitally important decisions in life. In choosing to work for Coast and Vale Learning Trust you are joining a team of colleagues dedicated to transforming the lives of 3000 children and young people. Our work is an important part of who we are, how we express ourselves, and working with young people is a tremendous privilege and at the same time a challenge and an adventure.

At Coast and Vale Learning Trust we believe that in order to transform young lives we need the highest quality staff who feel cared for and valued. Whether you are a teacher or receptionist, an IT technician or school leader, we want you to grow and develop in your role and to find your stay with the trust a fulfilling time in your working life.

Whenever you see the Coast and Vale logo you should spot the strapline “where learners and staff thrive.” Many organisations spend a great deal of time and effort in developing a strapline, yet at Coast and Vale we are more concerned about turning the strapline into reality. The word thrive indicates a place of healthy growth, plants thrive in the right environment and so we want to see our schools to be environments where learners (children as young as three up to young people aged eighteen) grow and develop and reach their potential. We also want to place the development of all our staff at the heart of what we do.

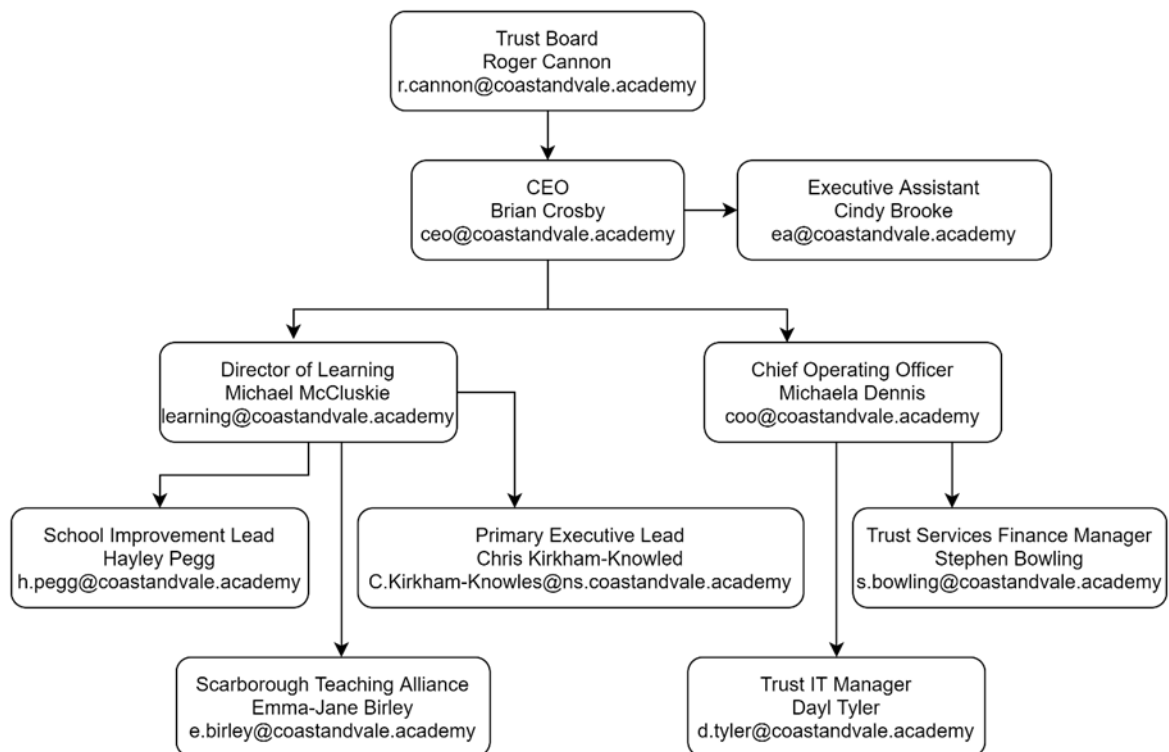
You will not be joining a single school, rather a family of schools that can thrive together, share resources and help each other through difficult times. We believe in ‘servant leadership’ where the principles of service underpin all we do.

**Brian Crosby,**

**CEO of Coast and Vale Learning Trust**

### Coast and Vale Learning Trust structure

All the staff working for Coast and Vale are line managed by the leadership of one of our five schools or by leadership of the central team. The central team does not work in a specific school context, but for the whole trust.



## **Coast and Vale Learning Trust: Our Schools**

### **Newby and Scalby Primary School**

We are one of the schools of choice in our community and we are within commutable distance of Whitby, Teesside, York and surrounding areas. Ofsted in 2018 judged us to be 'good' in all areas and as a school we are very much outward facing both in terms of teaching and learning and in constantly thinking about how we can improve.



Since our "good" Ofsted, we continue to build on our successes and we are a family and a team, where everyone is given the challenge and support to be the best they can possible be in a safe, welcoming and positive environment. Children and staff will work and play together developing skills so that we all become ambitious and reflective lifelong learners as well as being respectful and respected members of the community.

**To learn more about us please visit - [Newby and Scalby Primary School - Home \(coastandvale.academy\)](https://www.coastandvale.academy/newby-and-scalby-primary-school)**

### **Friarage Primary School**

We are proud to serve the communities around the Castle Ward area of Scarborough as 'Together we can' make a real difference to the life chances of children and young people in Scarborough.



Children and staff will work and play together developing skills so that we all become ambitious and reflective lifelong learners as well as being respectful and respected members of the community.

We are committed to Restorative Practice Principles to nurture respect for all in our school community.

**To learn more about us please visit - [Friarage Community Primary School - Home \(coastandvale.academy\)](https://www.coastandvale.academy/friarage-community-primary-school)**



## Scalby School

Scalby School is a successful and popular 11-16 community school and in recent years we have become the school of choice in our local community. We were judged 'good' by Ofsted in 2019 and in 2019 we celebrated sustained results. Our provisional P8 score has placed us in the top 20% of schools nationally. We are proud of our broad and balanced GCSE based curriculum.



To learn more about us please visit - [Scalby School - Home \(coastandvale.academy\)](https://coastandvale.academy/scalby-school-home)

## Lady Lumley's School

Lady Lumley's School (11-18) in Pickering is on a transformational journey. We are a school that is popular with parents and is easily accessible across North Yorkshire, East Riding and Wolds and Vale. The communities we serve around the Pickering, Ryedale and wider Coastal area deserve and need our school to play a leading role in terms of teaching, learning, progress and outcomes.



In April 2020 we welcomed our new Headteacher Clair Foden who joined us at the same time we joined our Trust - Coast and Vale Learning Trust. Lady Lumley's is on an ambitious journey of school improvement.

To learn more about us please visit - [Lady Lumley's School - Home \(coastandvale.academy\)](https://coastandvale.academy/lady-lumleys-school-home)

## Scarborough University Technical College

Scarborough UTC is a growing University Technical College (year 9 to year 13) based in a new building, with fantastic technical facilities in the centre of Scarborough. As a University Technical College, we offer a high quality academic and technical education for our students through the specialisms of engineering, health and cyber security. Our unique approach provides students with an excellent range of opportunities including Combined Cadet Force (CCF Navy), strong links to our industrial partners, project-based learning and our flagship Career Development Programme for our Sixth Form students.



Our work with employers and universities ensure we are able to deliver an innovative blend of technical, practical and academic learning which ensures our students make good progress and go on to outstanding destinations.

Our staff are our greatest resource and we have invested in both our teaching and support staff teams which has ensured that educational standards have improved significantly. We have built a staff team of key support and teaching practitioners who are proud to work at our University Technical College.

**To learn more about us please visit - <https://www.scarboroughutc.co.uk>**

## Filey Secondary School

Filey School (11 -16) is on an exciting journey. We have a proud heritage in our local community and are embarking on a period of transformation and improvement.



We aim for every member of our school community to develop a love of learning and enable them to reach the highest outcomes that they can. We are committed to ensuring our students are happy, safe and have clear direction and support.

We joined Coast and Vale Learning Trust in June 2022 and are looking forward to a future where our learners and staff can thrive.

**To learn more about us please visit - [Filey School - Home \(coastandvale.academy\)](https://coastandvale.academy)**



### **Application Process**

The closing date for all applications is: **Tuesday 30th August 2022, 9am**

Interviews will be held as soon as possible after the closing date

Completed applications must be returned to Helen Poole at  
[helen.poole@northyorks.gov.uk](mailto:helen.poole@northyorks.gov.uk)

**If you think you're the person for the job, please complete the enclosed application form and send to the email address above by the closing date.**

An email will be sent to shortlisted candidates with details of the interview process. If you have not heard from us within a week of the closing date please assume your application has been unsuccessful.

### **Queries**

Please contact Helen Poole via email [helen.poole@northyorks.gov.uk](mailto:helen.poole@northyorks.gov.uk) or on **07890 055 186**



### Job Description

<b>POST: Finance Assistant</b>	
GRADE: Grade F	
RESPONSIBLE TO: Trust Finance Officer/Trust Financial Services Manager (TFSM)	
STAFF MANAGED: None	
POST REF:	
<b>JOB PURPOSE:</b>	To assist the Trust Finance Services Manager (TFSM) to discharge the Trust's financial and related management duties under ESFA, by providing a full range of finance administrative and budget management support to the Trust and its schools, working under the immediate supervision of the Finance Officer.
<b>JOB CONTEXT:</b>	<p>The post is required to work with the finances of the Trust, maintain accurate records, and ensure timely payments. Working to support the senior members of the Finance Team to provide financial data and analysis to enable the Chief Executive Officer (CEO) and the Trustees to make effective resource deployment decisions</p> <p>This role is office based, but may require travel to and working at sites throughout the Trust.</p> <p>This Trust is committed to safeguarding and promoting the welfare of our pupils and young people. We have a robust Child Protection Policy and all staff will receive training relevant to their role at induction and throughout employment at the Trust. We expect all staff and volunteers to share this commitment. This post is subject to a satisfactory enhanced Disclosure and Barring Service criminal records check for work with children.</p>

## ACCOUNTABILITIES / MAIN RESPONSIBILITIES

Operational Issues	<ul style="list-style-type: none"> <li>• To support the Finance Officer/TFSM in the day to day operations of the department including purchase ledger, sales ledger and cashbook transactions</li> <li>• To ensure all relevant NYCC/ESFA finance paperwork is completed and returned by deadlines.</li> <li>• Input budget information into appropriate systems</li> <li>• To assist in the production of financial reports for the TFSM, detailing issues and recommendations</li> <li>• To support the TFSM in compiling statistics and monthly/annual returns, checking and analysing these return and raising any queries.</li> <li>• To support the Finance Officer to complete all Year End close down paperwork by the required deadlines.</li> <li>• To support the Finance Officer in preparing for Audit inspections</li> <li>• To support the Finance Officer in work with TFSM/COO on financial benchmarking, comparative statistical analysis and checks.</li> <li>• Undertake administrative duties as required</li> <li>• To ensure compliance with the Academy Trust Handbook &amp; Trust Finance Policy</li> </ul>
Communications	<ul style="list-style-type: none"> <li>• Communicate effectively with staff, ESFA, Trustees, Governors and supplier/contractors under the direction of the Finance Officer.</li> <li>• Provide reports as requested to enable the TFSM to interpret the finance data and enable them to make effective resource deployment decisions</li> <li>• Advise other staff on financial procedures</li> </ul>
Partnership Working	<ul style="list-style-type: none"> <li>• Work with our educational or supplier partners to ensure compliance with financial procedures and regulations</li> </ul>
Resource management	<ul style="list-style-type: none"> <li>• To support the Finance Officer to generate monthly income and expenditure analysis.</li> <li>• To support the Finance Officer to manage the process of paying suppliers including reconciling orders, inputting invoices, cheque/BACs production and subsequent filing invoices.</li> </ul>

	<ul style="list-style-type: none"> <li>• To support the Finance Officer to manage the process of invoicing customers, including reconciling orders, collating the necessary paperwork and collecting and allocating the receipts to regular reconciling of the sales accounts.</li> <li>• To support the Finance Officer with processing school credit card transactions and other month end procedures/reconciliations.</li> <li>• Attend staff meetings and training days</li> </ul>
Safeguarding	<ul style="list-style-type: none"> <li>• Be responsible for promoting and safeguarding the welfare of children and young people that you come into contact with, by knowing who to report your concerns to.</li> </ul>
Systems and Information	<ul style="list-style-type: none"> <li>• To manage an organised and effective filing and record system ensuring that this is auditable if required.</li> <li>• Maintain the school's financial system's</li> <li>• Share information appropriately – in writing, by telephone, electronically and in person.</li> </ul>
Data Protection	<ul style="list-style-type: none"> <li>• To comply with the Trust's policies and supporting documentation in relation to Information Governance this includes Data Protection, Information Security and Confidentiality.</li> </ul>
Health and Safety	<ul style="list-style-type: none"> <li>• Be aware of and implement your health &amp; safety responsibilities as an employee and where appropriate any additional specialist or managerial health &amp; safety responsibilities as defined in the Health &amp; Safety policy and procedure.</li> </ul>
Equalities	<ul style="list-style-type: none"> <li>• We aim to make sure that services are provided fairly to all sections of our community, and that all our existing and future employees have equal opportunities.</li> <li>• Ensure services are delivered in accordance with the aims of the equality Policy Statement.</li> <li>• Develop own and team members understanding of equality issues.</li> </ul>
Flexibility	<ul style="list-style-type: none"> <li>• The Trust provides front line services, which recognises the need to respond flexibly to changing demands and circumstances. Whilst this job outline provides a summary of the post, this may need to be adapted or adjusted to meet changing circumstances. Such changes would be commensurate with the grading of the post and would be subject to consultation. All staff are required to comply with Trust's Policies and Procedures.</li> </ul>

Customer Service	<ul style="list-style-type: none"> <li>• The Trust requires a commitment to equity of access and outcomes, this will include due regard to equality, diversity, dignity, respect and human rights and working with others to keep vulnerable people safe from abuse and mistreatment.</li> <li>• The Trust requires that staff offer the best level of service to their customers and behave in a way that gives them confidence. Customers will be treated as individuals, with respect for their diversity, culture and values.</li> </ul>
Date of Issue:	August 2022

### Person Specification

Essential upon appointment	Desirable on appointment
<b>Knowledge</b> <ul style="list-style-type: none"> <li>• Knowledge of finances, including knowledge of accounting and financial procedures</li> <li>• Knowledge of administrative systems and IT packages, including Microsoft Office</li> </ul>	<ul style="list-style-type: none"> <li>• Producing and managing budgets</li> <li>• Knowledge of Academy Trust Handbook</li> </ul>
<b>Experience</b> <ul style="list-style-type: none"> <li>• Experience of working in a finance role</li> <li>• Experience of using databases/Computerised accounts software</li> <li>• Experience of a purchase ledger function</li> <li>• Experience of a sales ledger function</li> </ul>	<ul style="list-style-type: none"> <li>• Experience of working in a finance role in a school environment</li> <li>• Experience of financial profiling</li> <li>• Experience of internal auditing</li> <li>• Managing financial accounts using financial systems</li> <li>• Experience of working with spreadsheets</li> </ul>
<b>Occupational Skills</b> <ul style="list-style-type: none"> <li>• Ability to manage an organised and effective record system</li> <li>• Analytical &amp; problem solving skills</li> <li>• ICT skills</li> <li>• Ability to use the keyboard with speed and accuracy</li> <li>• Attention to detail, neatness and accuracy</li> <li>• Organisational and time management skills</li> <li>• Ability to work as part of a team</li> </ul>	<ul style="list-style-type: none"> <li>• Budget Management skills</li> </ul>



<ul style="list-style-type: none"> <li>• Confidentiality</li> <li>• Good interpersonal skills</li> <li>• Ability to work without close supervision</li> <li>• Ability to present information in a logical, clear and concise format and communicate this effectively both verbally and in writing</li> </ul>	
<b>Qualifications</b> <ul style="list-style-type: none"> <li>• Relevant Level 3 qualification to evidence good numeracy skills or experience within the finance sector at this level or above</li> </ul>	<ul style="list-style-type: none"> <li>• NVQ with finance or AAT level qualification</li> </ul>
<b>Other Requirements</b> <ul style="list-style-type: none"> <li>• Enhanced DBS clearance</li> <li>• To be committed to the school's policies and ethos</li> <li>• To be committed to Continual Professional Development</li> <li>• Willingness to attend meetings in the evening, as required</li> </ul>	
<b>Date of Issue:</b>	August 2022



**SCARBOROUGH  
TEACHING ALLIANCE**



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