

# Tandridge Learning Trust

## Director of Finance & Information Technology

Information for Candidates



Excellent Teaching  
Inspiring Leadership  
Innovative Training

# CONTENTS

CONTENTS	2
WELCOME	3
JOB ADVERTISEMENT	4
SHARED SERVICES	5
JOB DESCRIPTION	6-10
PERSON SPECIFICATION	11
CONTACT DETAILS & HOW TO APPLY	12

*Tandridge Learning Trust is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment. The successful candidate will be subject to safer recruitment checks, including an enhanced DBS check.*

*As an equal opportunities' employer, Tandridge Learning Trust is also committed to achieving a diverse and inclusive workplace and strongly encourages suitably qualified applicants from a wide range of backgrounds irrespective of personal characteristics.*



Excellent Teaching  
Inspiring Leadership  
Innovative Training

# WELCOME



Dear Candidate

Thank you for enquiring about this post.

This candidate pack has been designed to give you essential information about our vacancy and the specifics of the role so you can decide if this should be the next step in your career. It should be read in conjunction with our booklet called, "Joining Our Team" which explains the benefits of working for Tandridge Learning Trust.

It is important to us that colleagues at every level feel valued and supported. We want you to enjoy working for our Trust and embrace being part of our dedicated teams, improving the lives and outcomes for our students. To this effect, we will ensure that development is a high priority and our commitment to you will begin immediately with a good on-boarding process, ensuring those first few weeks and months are an exciting, informative and rewarding experience.

I can guarantee that you will find our staff friendly, inclusive and welcoming, irrespective of which team you are joining. I hope that these factors, together with our excellent benefits will encourage you to apply for this vacancy.

We hope that this pack provides sufficient information to encourage you to take your application to the next stage. Do telephone or email, if you wish to discuss any aspect of the post - contact details can be found on page 10.

We look forward to receiving your application.

Kind regards,

**Rebecca Plaskitt**  
Chief Executive



# JOB ADVERTISEMENT

An exceptional opportunity with Tandridge Learning Trust exists for an enterprising and innovative qualified accountant with highly developed financial acumen and strategic vision to lead on finance and Information Technology (IT) development across a successful and growing multi-academy trust.

The Trust is in a strong financial position and has ambitious plans for development and future growth. We are looking for a pivotal leader to join our Executive Board and hold overall responsibility for the management of our financial and IT systems and processes.

The Director of Finance & IT will be leading a hard-working and dedicated finance and IT team, with a unique opportunity to shape our support functions as we grow and ensure we continue to offer a first-class service to all our schools and that we stay abreast of technological developments in these areas. The successful candidate will be aligned to our core values of equity, collaboration and integrity, have excellent interpersonal and communication skills, the ability to challenge when necessary and proven/prior experience of leading and managing teams successfully.

Overall responsibility:

- To provide strategic guidance, leadership and management of all the Trust's finances within the scheme of delegation and to advise the CEO and Trustees on all financial matters relating to the Trust in line with the Academy Trust Handbook.
- To be responsible for the delivery of financial support services throughout the Trust, including the management of the Trust's accounting system and controls.
- To be the primary point of contact for all aspects of funding and financial/statutory returns.
- To ensure sound and appropriate financial governance and financial risk management arrangements are in place, prepare and monitor budgets and ensure delivery of annual accounts in accordance with ESFA/DfE guidelines and externally determined deadlines.
- To provide strategic guidance, leadership and management of the Trust's IT provision, keeping abreast of technological developments in IT and challenging where necessary.
- To oversee the Trust's relationships with external IT providers, consultants and contractors.
- To support the CEO and Trust Board in developing the Strategic Plan, with particular focus on shared services of finance and IT.

In return we will offer you a range of excellent benefits. Full details can be found in our 'Joining our Team' brochure.

Please do not hesitate to contact us if you have any queries or would like to arrange an informal discussion with the Chief Executive, Please refer to our contact details and how to apply on page 12.

We look forward to receiving your application and welcoming you to our Trust.



Excellent Teaching  
Inspiring Leadership  
Innovative Training

# SHARED SERVICES



Our friendly and dedicated shared service teams are based at our newly refurbished offices on our large campus in Warlingham, which is also home to two of our biggest schools. Our offices are bright and airy, with attractive outside green space with seating area, secure, off street parking and excellent facilities. In the same building, we have a fantastic suite of meeting rooms and conference facilities that are available for internal and external use.

We have several professional teams who work collaboratively to support and enable our schools to function efficiently. This involves providing strategic professional guidance and well as undertaking a range of operational activities.

Working with external partners when necessary, we aim to ensure processes, guidance and advice is consistent whilst supporting school leaders and other staff as required.

Our main functions include:

- Finance
- IT
- Human Resources
- Marketing
- Compliance
- Governance Support

Led by enthusiastic, forward-thinking and qualified managers, our teams have a wealth of knowledge and are keen to maintain successful relationships with all stakeholders. Opportunities for growth and development within the shared service functions means that we employ a range of dedicated people, including apprentices, administrators and managers who all strive to achieve their full potential together and share our values of equity, collaboration and integrity.





# JOB DESCRIPTION

<b>Job Title</b>	Director of Finance & IT
<b>Accountable To</b>	Chief Executive and Board of Trustees
<b>Responsible To</b>	CEO
<b>Responsible For</b>	Finance and IT Teams
<b>Grade / Scale / TLR</b>	TLT 13
<b>Date</b>	June 2022

## Job Purpose

To contribute to the Trust's strategic leadership as the Chief Finance Officer. To hold overall responsibility for the management of the Trust's financial and IT systems and processes, and to be accountable for financial regulatory compliance, ensuring that these operational areas contribute to outcomes above expectations for the Trust's students, especially in the standards they attain and the progress and achievement they make.

Understanding, operating and developing the ethos of the Trust so that it becomes a centre of excellence where mutual respect, tolerance, care and support are evidenced in all of the Trust's activities and that this in turn ensures that everybody takes pride in all aspects of the Trust's work.

## Key Accountabilities and Tasks

The specific nature and balance of these responsibilities will vary according to the needs of the MAT and may be shared.

## Overall Responsibility

- To provide strategic guidance, leadership and management of all the Trust's finances within the scheme of delegation, advising the CEO and Trustees on all financial matters relating to the Trust.



# JOB DESCRIPTION

- To be responsible and accountable for the delivery of financial support services throughout the Trust, including the management of the Trust's accounting system and internal controls
- To be the primary point of contact for all aspects of funding and financial/ statutory returns
- To be responsible for the statutory accounts, financial returns and reports to Trustees, ESFA/DfE and other statutory bodies in accordance with guidance and externally determined deadlines.
- To lead the promotion and delivery of sound financial management throughout the organisation, in line with the Academies Financial Handbook.
- To ensure sound and appropriate financial governance and financial risk management arrangements are in place, prepare and monitor budgets and ensure the delivery of annual accounts in accordance with the Academy's Financial Handbook, ESFA guidelines and all statutory requirements

## Finance, Audit and Risk

- To ensure the Trust complies with its obligations in accordance with the funding agreement, the Academy Trust Handbook and the Trust's own financial regulations and procedures.
- To advise and support the CEO in their responsibilities as Trust Accounting Officer.
- Ensure that the Trust follows best practice in terms of financial governance, and ensure the probity, and legislative compliance, of all financial transactions, including the integrity and suitability of all control mechanisms (audit and risk management).
- To act as financial lead in the strategic planning process, deliver annual and medium-term budget plans, periodic forecasts and funding requirements, working closely with the CEO to ensure consistency with the Trust's strategic and financial objectives.
- To contribute fully to all areas of Trust strategy and provide financial analysis and guidance on all activities, plans and targets.
- To ensure that infrastructure services are of high quality and well-led, cost effective and efficient, and enable schools to focus on the quality of education.
- To use analysis and complex financial information in relation to the Trust to develop solutions, plans and strategies that create medium, and long-term success.
- To continually review and improve the existing financial systems and policies ensuring they are streamlined, efficient, robust, compliant and support current activities and future growth.
- To lead on the Trust's approach to audit management.
- To act as a main point of contact for the Trust's appointed Internal Audit and External Audit consultants, acting as a conduit between Trustees, audit consultant teams and academy/ Trust colleagues involved in



# JOB DESCRIPTION

audit processes and reviews.

- To ensure the Trust's approach to internal and external scrutiny is fit for purpose and in line with statutory guidelines.
- To manage the development of financial reporting systems including KPIs.
- To provide financial management reports to the Board of Trustees, Finance, Audit and Risk Committee and the DfE/ ESFA.
- To be responsible for the preparation of the annual accounts to prescribed standards, taking responsibility for the completion and submission of statutory/ regulatory reporting in line with prescribed timelines.
- To manage the income and expenditure budgets across the Trust in line with the scheme of delegation, and to identify any potential financial risk and implement strategies to address issues arising.
- To proactively manage the Trust's relationship with its bankers, to ensure that appropriate and efficient systems are in place for the Trust's accounting procedures.
- To proactively manage the cash position of the Trust and its operating activities, reporting regularly on this aspect of financial management to the Trustees.
- To plan and coordinate all tax and treasury management practice and policy, with particular reference to charitable status, cash management and investments.

## Strategic Leadership

- To provide strategic advice on complex financial issues.
- To analyse and interpret varied and complex information and develop solutions and produce plans/ strategies over the medium and long term.
- To prepare the Trust's annual financial forecasts, medium and long-term corporate plans and report to the CEO and Board of Trustees.
- To develop and implement strategies for maximising the Trust's current finances.
- To lead the central finance team, including line management and the development and quality assurance and oversight of financial systems and procedures.
- To build close and effective working relationships with key partners and stakeholders.
- To participate in the management of major Trust projects as required by the CEO.
- To oversee the Trust's long-term plan for capital development and investment, managing all financial aspects of major capital projects.
- To develop, design and implement financial policies and working practice across the Trust to streamline functions and ensure efficiency and value for money.



Excellent Teaching  
Inspiring Leadership  
Innovative Training



# JOB DESCRIPTION

- To work closely with the CEO, Trust Central Services team and the Board of Trustees in relation to risk mitigation, best value procurement and resource management across the Trust ensuring financial sustainability and appropriate use of funding.
- To manage the Network Manager and the strategic direction of IT across the Trust.

## Payroll and Pensions

- To ensure that services for payroll and pensions across the Trust are efficient, of best value and ensure compliance with all relevant and up to date legislation.

## Procurement and Project Management

- To own the procurement strategy and ensure all policies and procedures for buying and ordering supplies and services are robust, fully compliant and operate highly efficiently, generating economies of scale and value for money.
- To advise the Trust on insurance requirements and make appropriate arrangements for insurance cover as required.
- To work with others to identify opportunities for innovative approaches to procurement to ensure best value.
- To oversee the management of contracts and procurement to ensure that the Trust achieves maximum value for money across all its activities and maintain a strategic overview of services as the MAT grows.

## Capital Planning and Asset Management

- To identify capital grant opportunities and oversee the preparation for capital grants and bids.
- To contribute to the preparation of a rolling programme of annual capital purchase plans.
- To produce and implement appropriate policies and procedures for the procurement, depreciation and disposal of all assets for the Trust.

## IT

- To provide strategic guidance, leadership and management of the Trust's IT provision, keeping abreast of technological developments in IT and challenging where necessary.
- To oversee the Trust's relationships with external IT providers, consultants and contractors

## Organisational Responsibilities

- To be responsible for the strategic planning, development, design, organisation and monitoring of financial support services and whole Trust financial systems/ procedures/ policies.



# JOB DESCRIPTION

- To undertake a lead role in supporting the conversion of new schools into the Trust including overseeing due diligence for all financial and infrastructure aspects.
- To audit all financial functions across the Trust and recommend new structures to meet evolving needs.
- To promote financial awareness throughout the Trust.
- To interpret matters of policy/ procedure/ statute and ensure the Trust's compliance and initiate appropriate action arising.

## General Responsibilities

- To contribute to and uphold the overall vision and ethos of Tandridge Learning Trust.
- To recognise own strengths and areas of expertise and use these to inspire, advise and support others.
- To promote teamwork, working in partnership to ensure effective working relations.
- Treat all users of the schools within the Trust with courtesy and consideration.
- To be aware of and comply with all Trust policies at all times.
- To assist with the development of policies and procedures as may be required, including those outside own remit of role.
- To maintain a presence in local and national professional networks and through these, and other means, ensure a continuous overview of appropriate policies and developments to keep abreast of current and best practice.
- To produce, and respond to, complex correspondence from stakeholders and external agencies.
- To participate in training and other learning activities and performance development as required.
- To maintain confidentiality and integrity at all times in respect of Trust-related matters and to prevent disclosure of confidential and sensitive information.
- To undertake other duties commensurate with the senior nature of the post as directed by the CEO.

## Continuing Professional Development

- Take responsibility for personal professional development, keeping up-to-date with developments related to efficiency, which may lead to improvements in the day-to-day running of the Trust's facilities.
- Undertake any necessary professional development as identified in the Trust's Strategic Plan taking full advantage of any relevant training and development available.

## Safeguarding

- All staff have a responsibility to promote and safeguard the welfare of children in line with the Trust's Safeguarding and Child Protection policies.



Excellent Teaching  
Inspiring Leadership  
Innovative Training

# PERSON SPECIFICATION

	ESSENTIAL	DESIRABLE
QUALS & EXPERIENCE	<ul style="list-style-type: none"> <li>Relevant professional qualification in accounting (e.g. ACA, ACCA, CIMA) or comparable financial experience</li> </ul>	<ul style="list-style-type: none"> <li>Evidence of CPD relevant to the role</li> </ul>
KNOWLEDGE & EXPERIENCE	<ul style="list-style-type: none"> <li>Minimum 3 years experience of strategically managing the finances of a medium sized organisation to provide long-term financial planning and cost analysis.</li> <li>Produced management and statutory accounts (</li> <li>Experienced senior leader, able to contribute and challenge effectively as a key member of the Executive team</li> <li>Experience of supporting good governance</li> <li>Understanding of sources of funding for schools including GAG and special grants (or the ability to acquire it)</li> <li>Experience of managing a successful team</li> </ul>	<ul style="list-style-type: none"> <li>Experience of strategically managing and developing IT to help drive efficiencies</li> <li>Demonstrable evidence of achieving successful organisational change through the implementation of cost-effective, efficient financial systems and functions</li> <li>Up to date knowledge of charity accounting and SORP</li> <li>Experience of using financial management systems</li> <li>Experience of working within the parameters of the Academy Financial Handbook and ESFA rules.</li> </ul>
SKILLS & APTITUDES	<ul style="list-style-type: none"> <li>Strategic thinker</li> <li>Strong organisational and communication skills</li> <li>Able to work collaboratively and effectively within a team environment</li> <li>Ability to generate financial models and concepts and translate them into tangible tactics</li> <li>Able to build and maintain successful relationships with stakeholders</li> <li>Able to work under pressure and use initiative</li> </ul>	<ul style="list-style-type: none"> <li>Able to design and implement systems to support the future growth and development of the Trust</li> </ul>
PERSONAL ATTRIBUTES	<ul style="list-style-type: none"> <li>Friendly, approachable and enthusiastic with a positive 'can do' attitude</li> <li>Team player</li> <li>Results driven and able to measure own outcomes</li> <li>Flexibility, energy and stamina</li> </ul>	<ul style="list-style-type: none"> <li>Ability to coach and develop others</li> </ul>
SAFEGUARDING	<ul style="list-style-type: none"> <li>Ability to form and maintain appropriate relationships and personal boundaries with children and young people in line with the Trust's Child Protection &amp; Safeguarding and related policies</li> </ul>	

# CONTACT DETAILS & HOW TO APPLY

Please complete the Trust's application form and return it electronically together with any supporting documentation requested to [HR@TandridgeLearningTrust.co.uk](mailto:HR@TandridgeLearningTrust.co.uk).

## CLOSING TIME & DATE: 10am on Monday 11th July 2022

Please note that applications will be considered upon receipt. Early applications are encouraged as we reserve the right to close the recruitment process once a suitable candidate is appointed.

If you would like an informal discussion with the Chief Executive about the role, please contact Judith (details below) who will be pleased to make arrangements.

## Designated Contact for this Vacancy

Name:	Mrs Judith Standen
Job Title:	HR Manager
Phone Number:	01883 776677 x2014
Email Address:	<a href="mailto:j.standen@tandridgelearningtrust.co.uk">j.standen@tandridgelearningtrust.co.uk</a>

*Please note that in accordance with our Safer Recruitment practices, CV's will not be accepted.*

*References will be sought for shortlisted candidates prior to interview, unless a specific request is made to the contrary.*







# Tandridge Learning Trust



Tithepit Shaw Lane, Warlingham, CR6 9YB



01883 776677



Info@TandridgeLearningTrust.co.uk



www.TandridgeLearningTrust.co.uk



facebook.com/TandridgeLearningTrust



linkedin.com/company/tandridge-learning-trust/



twitter.com/tandlearntrust



Tandridge Learning Trust is an exempt charity and a company limited by guarantee, registered in England with Company Number 8248059 and has a registered office at Tithepit Shaw Lane, Warlingham, Surrey, CR6 9YB .

Excellent Teaching  
Inspiring Leadership  
Innovative Training