



The  
**Balcarras  
Trust**

Gloucestershire  
Association of  
Secondary Leader  
and GASSL Ltd



**Applicant Pack**



The Balcarras Trust came into existence on December 1<sup>st</sup> 2020. We are a Multi Academy Trust based in Gloucestershire. Prior to this the company (Balcarras School) was a Single Academy Trust.

### **The Mission Statement of The Balcarras Trust:**

The Balcarras Trust is committed to delivering outstanding inclusive, comprehensive education in each of its schools. Every child within the Trust will be expected, encouraged and supported to reach their full potential and, when they leave school, to be fully equipped to go on to be successful in the next phase of their lives.

The Trust will establish and maintain high standards of teaching, pastoral care and behaviour in its schools. No child will be "left behind." There will be excellent opportunities for extra-curricular activities.

Each member of staff in the Trust's schools will be an excellent role model and will play their part in ensuring that each school in the Trust will have its own special ethos. Students will feel proud of their school.



Balcarras is a co-educational 11-18 comprehensive school situated in Charlton Kings on the Eastern side of Cheltenham. Consistently rated outstanding by Ofsted, it has also been recognised by The Sunday Times as the highest performing comprehensive school in the Southwest. Balcarras's performance at A level and GCSE is amongst the highest for any school in the country.





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**Currently there are three schools in the Trust:**

**Balcarras:** an 11-18 coeducational academy with 1402 pupils on roll. Consistently rated outstanding by Ofsted, the school secures superb outcomes at both GCSE and A level. Recently the school was awarded the Sunday Times Southwest State School of the Decade Award. The school is led by Dominic Burke (Headteacher) who combines this role with CEO of the Trust. Balcarras is the lead school in the GLOW Maths Hub and the Balcarras Teaching School Partnership. Balcarras is located in Charlton Kings and is currently where the Trust's registered office is located.

**The High School Leckhampton:** a brand new 11-16 coeducational comprehensive academy with an eventual capacity of 900. The school opened in September 2021 initially on the Balcarras site. It transferred to its own purpose built accommodation in September 2022. It now occupies a beautiful campus at Farm Lane in Leckhampton. This facility cost £35 million and is state of the art. The school is led by Helen Wood and has for the first two years of its existence been oversubscribed. It achieved "outstanding" during its first full graded inspection in 2024.

**Winchcombe School:** a high-performing school with high expectations for their students balanced against a supportive environment to help every individual towards success. The school has been led for the last 6 years by Jonathan Templeton and has gone from strength to strength. It achieved record GCSE results in 2022 and 2023 placing it amongst the most successful secondary schools in the county. The school is relatively small and visitors often comment on the 'family feel' which the school rightly prides itself on. Set in an idyllic location with excellent facilities they offer an environment for learning that is both unique and stimulating. A recent multi-million pound investment has added new and refurbished facilities in Sport, Science, Technology and Drama. The school was last inspected by OFSTED in 2024 and it was rated good in all areas.

**In addition the Trust has a wider role as a system leader:**

**Outreach work:** The Balcarras Trust is a leading provider of professional development for educators. The Trust runs the GLOW Maths Hub which is responsible for leading maths education in this region. GLOW has an annual turnover of close to £1 million. The Trust has the contract to run the Teaching School Hub for Cheltenham, Stroud and The Cotswolds.

The Trust runs its own School Direct teacher training programme working alongside the Gloucestershire Initial Teacher Education Programme (GITEP) which is run by the Gloucestershire Association of Secondary School Leaders and GASSL Limited. In 2024 Balcarras became the lead school for GITEP.

We mention these initiatives because we believe it demonstrates our commitment to professional development and the importance of collaboration.





**Gloucestershire Association of Secondary School Leaders and GASSL Ltd** is a unique and dynamic charitable organisation working in partnership with other organisations, on behalf of secondary schools in Gloucestershire, to provide teacher training, professional development, and support for schools. GASSL Ltd's main work currently consists of:



### **Gloucestershire Initial Teacher Education Partnership**

A school-centred initial teacher training provider (SCITT) judged outstanding by Ofsted and rated among the top secondary teacher training providers in the country. GITEP SCITT recruits and trains around 80 new teachers each year with the intention they will go on and work in one of our 30+ partner schools in Gloucestershire.



### **Teach Glos**

Teach Glos is a school led charity dedicated to strengthening education across Gloucestershire. Led by serving headteachers and supported by school-employed staff, we deliver high-quality professional development and reinvest every surplus back into training and development for teachers and leaders. Responsive and collaborative, Teach Glos partners with schools and teaching alliances to ensure our services meet real, evolving needs.



### **School Business Manager Partnership**

An established partnership between Serco Education, Teach Glos, and the Institute of School Business Leaders (ISBL). The leading provider of national programmes for School Business Managers, Business Directors, and School Administrators.



### **Subject Knowledge Enhancement programme**

A partnership with Vidlearn, the UK's leading platform for distance learning subject knowledge enhancement (SKE) courses, which are funded by the Department for Education for and available to those thinking of starting an initial teacher training programme.

## What is it like working with GITEP?

GITEP is a school centred initial teacher training provider (SCITT). GITEP is a very successful programme, judged Outstanding by Ofsted in 2023 and rated among the top secondary teacher training providers in the country. GITEP SCITT recruits and trains around 80 new teachers each year with the intention they will go on and work in one of our 30+ partner schools in Gloucestershire. GITEP SCITT works in partnership with the University of Bristol, which accredits the Postgraduate Certificate in Education.

The Balcarras Trust is responsible for GITEP, but GITEP is run by the Gloucestershire Association of Secondary School Leaders and GASSL Limited. All GASSL Ltd staff work for schools. All members of the GITEP staff who are not currently serving teachers are employed by The Balcarras Trust, ensuring consistency of terms and conditions and access to the local government pension scheme.

GITEP SCITT is based at Cheltenham Bournside School. We have our own space within, but separate to, the main school. The space includes an area for meetings and training, and two small offices. There are currently six people based here but it is rare that everyone is there at the same time due to part-time and flexible working arrangements, and the fact that the course leaders spend a lot of time out and about in schools.

GITEP staff enjoy working as part of a team and value building relationships with all our partners, stakeholders, and trainees. It is vital to us to be seen as efficient and professional but also friendly and approachable. We also value flexibility and a willingness to pitch in and help with any tasks which need doing, especially when other members of the team are particularly busy.



## Finance Manager - General Job Description

<b>JOB TITLE:</b>	Finance Manager
<b>HOURS:</b>	25 hours per week. It is anticipated this will be five hours per day over five days per week, however hours could potentially be flexibly distributed across a working week if agreed.
<b>RESPONSIBLE TO:</b>	Chief Executive Officer of Teach Glos and Gitep SCITT Director & GASL Ltd Trustees
<b>GRADE:</b>	Grade 8 Point 26-30 FTE: £36,124 - £39,513 Actual salary: £24,408.11—£26,695.27 Local Government Pension Scheme is available.

### JOB PURPOSE:

To oversee and manage all financial systems and operations for Gloucestershire Association of Secondary School Leaders and GASL Ltd, including the Teach Glos programme and GITEP SCITT, ensuring robust financial control, compliance with statutory requirements, and effective financial support for all programmes.

### PLACE OF WORK:

- A minimum of 2-3 days per week in the office at Cheltenham Bournside and remote working from home, as agreed.

### MAIN DUTIES AND RESPONSIBILITIES:

#### 1. Financial Management & Reporting

- Lead the annual budgeting process in collaboration with programme leads and senior staff.
- Monitor income and expenditure, provide variance analysis, and deliver clear financial reports to management and trustees.
- Financial Reporting: Prepare comprehensive financial reports for trustees and management committees, including monthly management accounts, cash flow forecasts, and variance reports. Ensure reports are accurate, timely, and clearly presented to non-financial stakeholders.
- Oversee sales invoicing and purchase orders, ensuring accuracy and completeness.
- Manage all period- and year-end procedures, including statutory returns to the DfE, Companies House and Charity Commission.
- Maintain and operate the SAGE accounting system, ensuring data accuracy and providing user support.

#### 2. Financial Operations

- Oversee bank reconciliation and day-to-day cash flow management.
- Process payments for suppliers, trainees, and bursaries in a timely and accurate manner.
- Manage fee collection and standing orders, ensuring prompt resolution of payment issues.
- Act as the key contact for trainee finance matters and liaise with bodies such as the Student Loans Company and DfE to process trainee data accurately.
- Respond to supplier and finance-related queries efficiently and professionally.

## Finance Manager - General Job Description continued

### 3. Programme Support & Liaison

- Work closely with programme teams to support financial planning and monitoring for training programmes (e.g., ITT, QTS AO, SKE, SBM).
- Provide financial advice to programme leads and support their budget management.
- Governance Participation: Attend and contribute to meetings of the GASSL Ltd trustees and GITEP SCITT.
- Management Committee, presenting financial updates, responding to queries, and supporting strategic financial planning.

### 4. Compliance, Policy & Contracts

- Ensure financial activities meet legal, regulatory, and internal policy requirements including accounting standards, charity law, and company law.
- Develop and review finance policies and procedures, keeping them aligned with best practice.
- Manage contracts and relationships with financial service providers and key suppliers, monitoring performance and negotiating terms when required.
- Identify and mitigate financial risks through robust internal controls and regular review processes.

### 5. Leadership & Team Management

- Line manage the Finance Officer and finance admin staff, providing clear guidance, feedback, and development opportunities.
- Promote an organised, professional, and collaborative working environment.
- Ensure Health & Safety and GDPR compliance within the finance team.

### General Responsibilities

- Flexibility: Adapt working hours and priorities as necessary to meet business demands, including occasional extended hours or workload reprioritisation.
- Professional Development: Participate actively in personal and professional development activities, including line management meetings, team meetings, training sessions, and annual appraisals.
- Data Protection: Maintain strict confidentiality and ensure compliance with GDPR in handling financial and personal data.
- Policy Compliance: Adhere to all organisational policies and procedures, including Health and Safety, Equality, and Diversity

\* The postholder's duties may vary from time to time according to the needs of the business and stakeholders. Such variations do not *necessarily justify a reconsideration of the grading of the post.*

## Finance Manager – Person Specification

	Essential	Desirable
Qualifications and Training	<ul style="list-style-type: none"> <li>• Good standard of general education</li> <li>• GCSE English and Mathematics (Grade C or above) or their equivalent</li> <li>• Finance management training or qualifications</li> <li>• AAT or CIMA qualified</li> </ul>	<ul style="list-style-type: none"> <li>• Chartered accountant</li> <li>• Degree in finance, accounting, business, or related field</li> </ul>
Experience	<ul style="list-style-type: none"> <li>• Minimum of 2-3 years' experience of financial procedures and processes, including forecasting, budgeting and monitoring.</li> <li>• Internal and external audits</li> <li>• Working knowledge of an accountancy IT system</li> <li>• Project costing and budgeting</li> <li>• Use of Microsoft Office applications, in particular Word and Excel</li> </ul>	<ul style="list-style-type: none"> <li>• Previous experience of working in an educational, charity or public funded setting</li> <li>• Previous experience of managing a small team</li> <li>• Experience of working with SAGE</li> <li>• Experience with statutory financial reporting (Charity Commission, Companies House, DfE)</li> </ul>
Key skills and competencies	<ul style="list-style-type: none"> <li>• Strong accounting skills up to P and L and TB</li> <li>• Strong organisational skills</li> <li>• Good numeracy skills and an eye for accuracy</li> <li>• Good standard of written and oral communication</li> <li>• Ability to prioritise and work under pressure to meet tight deadlines</li> <li>• Excellent interpersonal and customer service skills</li> <li>• A professional approach to work</li> <li>• Thorough understanding of financial compliance and governance requirements</li> </ul>	<ul style="list-style-type: none"> <li>• Proficiency in financial modelling and forecasting tools</li> <li>• Advanced Excel skills including pivot tables and formulae</li> </ul>
Personal Qualities and Attributes	<ul style="list-style-type: none"> <li>• Accurate and methodical in approach to work</li> <li>• Proactive approach to challenges</li> <li>• Adaptable, flexible and approachable</li> <li>• A team player with a capacity for hard work and a willingness to go the extra mile</li> <li>• Self-motivator who takes pride in their work</li> </ul>	<ul style="list-style-type: none"> <li>• Advanced Excel skills including pivot tables and formulae</li> </ul>

## Selection Process

- ⇒ Qualifications, experience and suitability for the post will be considered during the shortlisting process.
- ⇒ Shortlisting will be undertaken by the GASSL Ltd CEO and Operations Manager meeting together to review applications.
- ⇒ Unsuccessful applications will be notified by email. Unsuccessful candidates can request feedback by email.
- ⇒ Successful applicants will be invited for interview by telephone or email.
- ⇒ References will be requested at this stage.

**Please stipulate clearly on your application form should you wish for your references not to be checked prior to job offer.**

- ⇒ A formal letter confirming the interview arrangements and plan for the day will then be emailed to candidates including details of documentation that will be required to be presented on the day.
- ⇒ One of the requirements of the day will be to complete a “Declaration of Criminal Record and other information” check.
- ⇒ If you have a DBS certificate from your current work place, you will be required to show this.
- ⇒ Candidates will be required to undergo a formal interview (including safer recruitment questions) and, where appropriate, a task. All information concerning the day will be provided in the formal letter.
- ⇒ A decision will be made on the day where possible.
- ⇒ Successful candidates will be notified by telephone .

For all enquiries about this position please email [jobs@balcarras.gloucs.sch.uk](mailto:jobs@balcarras.gloucs.sch.uk)

<https://www.thebalcarrastrust.co.uk>