



CANDIDATE
**RECRUITMENT
PACK**

Trust Finance Manager

September 2024



AMBITION INCLUSION ASPIRATION COMMUNITY BELIEF



MESSAGE FROM THE CEO

Welcome to South Manchester Learning Trust

“Ensuring the best outcomes for children and young people”

Our History

Altrincham College was established as a single academy trust in 2012 before quickly expanding to include another secondary school, Reddish Vale High School in Stockport.

Today our Trust is moving into the next phase of its journey with a newly established CEO, a renewed vision, set of values and plans for growth in our locality.

Very soon, our trust will have a new identity, which has been designed to show our commitment to working together for school improvement. The South Manchester Learning Trust will soon be called the Achieve and Learn Trust.

**Achieve
Learn
Trust.**
Better, together.



Ms Kim Earle, CEO
South Manchester Learning
Trust

Our Vision

At the heart of the Trust's vision is a belief that students deserve the best educational experience with aspirational curriculum provision and enrichment opportunities. We strive for personal and academic achievement within a safe, inclusive and enriched learning environment: opening minds, opening doors to learning opportunities and opening up pathways to successful futures.

The Trust acknowledges that each school has its own unique culture, identity and traditions which must continue to be embraced and celebrated. However, our team of Trust schools are committed to working together to drive school improvement and secure the best possible outcomes for all our students.

Our Values

We believe that the Trust's values should be clearly evident across all schools, demonstrated by students and staff alike:

Ambition: we instil a lifelong love of learning and nurture skills and talents.

Inclusion: we welcome and respect people from all backgrounds, valuing and celebrating diversity.

Aspiration: we want people to be the best that they can be, and for everyone to achieve their potential.

Community: we develop local and global citizens of the future, always committed to working in partnership.

Belief: we encourage everyone to believe in themselves and their future, providing opportunities to excel.

Our Aims

Our aim is to ensure that all schools within the Trust aspire to be 'Outstanding' and, with our support, hold a minimum of a 'Good Provider' rating from Ofsted.

Our Future

We have an appetite for continuous improvement and development, with an overall ambition of expanding the Trust to develop a local partnership of schools, covering both primary and secondary phases. This will enable us to foster true partnership and collaborative work that both supports and challenges member schools.

Our Governance

We have three members who hold the board of trustees to account for the performance of the trust. In addition to the trust board, each member school has its own local governing body.

Kim Earle

A handwritten signature in black ink that reads "K Earle".

CEO, South Manchester Learning Trust and Headteacher of Altrincham College



ROLE OVERVIEW

Trust Finance Manager

CONTRACT TERM:

Permanent, – term time, plus 3 weeks (41 weeks in total)

HOURS:

36.25 hours per week (08:00 – 16:00)

PAY SCALE:

NJC Band 9 Points 33-36
(Actual Salary £37,451-£40,173)

LOCATION:

Altrincham College, Trafford
LA, South Manchester

START DATE:

As soon as possible

If you would like to apply to be part of our Trust at this exciting time, please visit the 'Job Vacancies' page on our school websites [Altrincham College](#) / [Reddish Vale High School](#) where you will find an application form and more information on the schools within our Trust.

Please send your completed application form to smlt-recruitment@altrinchamcollege.com

CLOSING DATE:

Tuesday 8 October 2024 at 12:00

INTERVIEW DATE:

Friday 11 October 2024

South Manchester Learning Trust are seeking to appoint an experienced and highly motivated Trust Finance Manager responsible for delivering an effective, compliant and consistently high-quality financial management and reporting service for the Trust. This will be achieved through the implementation of robust, measurable systems and processes which maximise the use of resources and deliver best value.

Reporting to the Chief Finance Officer, the successful candidate will be an integral part of the team, working in collaboration with staff members at each school, whilst managing a team of experienced Finance Officers based at Altrincham College.

The role demands strong organisational and people management skills and an ability to prioritise workloads. The successful candidate must have excellent interpersonal and leadership skills, as well as the ability to maintain a sense of calm in a busy school environment.

We are looking for someone with:

- Management and leadership experience, preferably within an education or local authority setting.
- Experience of financial management – preparation of monthly accounts, budget analysis with the ability to provide financial guidance to senior leaders within the schools.
- Experience of financial accounting – monthly reconciliations, payroll checks, managing financial policies, systems and procedures.
- Hold a finance qualification relevant to the role.
- The ability to inspire confidence and think creatively.
- A commitment to always place our students at the centre of all decision making.

This is a newly created role and an exciting opportunity to join a growing trust with fantastic values, who are truly committed to providing the best education to their students. It will be a chance for the right candidate to join a great place of work and take ownership of the role and make it their own, under the leadership of the CFO.

South Manchester Learning Trust

Personal Growth, Academic Excellence

JOB DESCRIPTION

JOB TITLE: TRUST FINANCE MANAGER

JOB PURPOSE: To provide financial leadership and professional financial management to support the Headteachers in our Trust's schools, in accordance with the Academy Trust Handbook and the Trust's Financial Procedures.

ACCOUNTABLE TO: Chief Finance Officer

SCALE: Band 9 points 33 to 36

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In all things, we expect our staff to work towards achieving the vision for our Trust, embracing our values and showing ethical leadership at all times.

Corporate Responsibilities

- To uphold our commitment to safeguarding and to promote the wellbeing of children.
- To actively promote the vision and values of our Trust with all stakeholders, including trustees, local governors, colleagues, parents, visitors and the local wider community of all our schools.
- To robustly follow all policies, procedures, working practices and regulations, and in particular to comply with policies relating to Safeguarding, Equal Opportunities, Academy Trust Handbook, Financial Procedures, Health & Safety, Confidentiality, Data Protection, reporting any concerns to the Chief Executive Officer.
- To contribute to a culture of continuous improvement.
- To comply with all reasonable management requests.

Key Responsibilities include:

- To support the Chief Finance Officer in providing financial leadership and professional financial management for the Trust and its schools, in accordance with the Academy Trust Handbook and the Trust's Financial Procedures.
- To have Trust-wide responsibility for comprehensive financial planning, ensuring robust financial systems and controls to safeguard finances and ensure efficiency and value for money.
- To work closely with Trustees, Governors and School Leaders to provide tailored reports at various organisational levels.
- To assist with the Trust's long term financial strategy and planning, conducting thorough analyses of current and future income streams, expenditure and trends to inform strategic decision making.
- To prepare comprehensive management accounts and present to stakeholders.
- To line manage the finance team, including their induction, training and appraisal.

Areas of responsibility and key tasks:

Finance and Accounting:

- In consultation with the Chief Finance Officer, Headteachers and School Business Managers, assist with preparing the Trust and schools' budget plans and review and update as necessary.
- Establish a high level of credibility and manage strong working relationships with internal and external parties.
- Advise Trustees and other stakeholders on the financial implications of government and local authority policies and provide appropriate guidance on financial governance.
- Monitor income and expenditure in relation to the Trust approved budgets and produce monthly management reports for the Trust, Headteachers and Governing Bodies.
- Provide budget holders with advice on matters relating to their budgets.
- Prepare income and expenditure reports in accordance with financial regulations.
- Co-ordinate all the annual external audit (interim and final), liaising with all parties involved, and preparing papers and workings to support the external auditors.
- Prepare information as required for the internal assurance reviews, liaising with all parties involved, preparing papers and workings as required.
- Maintain and oversee all bank accounts including the charge card(s), completing monthly reconciliations and reporting any anomalies to the Chief Finance Officer.
- Ensure that the Trust's financial procedures manual is reviewed and updated as necessary and that the school resource management self-assessment tool is maintained as per DFE requirements.
- Ensure accurate VAT accounting and payment, and that VAT reclaim returns are submitted as required.
- Be responsible for cash flow projections and all elements of cash handling including collections and disbursements, banking and security, fundraising and school trips.
- Maintain an effective payroll system and ensure compliance with all relevant legislation ensuring all forms including timesheets, new starter/leaver/variation forms and annual returns are submitted within required deadlines.
- Monitor the payment of salaries by the school's payroll provider, liaising with the provider as required.

- Be responsible for overseeing the placement of orders, ensuring colleagues follow the required processes and are processed through the Trust's computerised finance accounting package.
- In conjunction with the nominated staff members, scrutinise and attend to the payment of all invoices and statements of account.
- Be responsible for the issue of all invoices following up their prompt payment.
- Carry out and keep analyses of costs and other statistical information.
- Contribute to the review of financial systems and processes; playing a key role in the planning and implementation of any new or revised systems/processes with the Chief Finance Officer.
- Maintain all Trust and school insurances including assessments, claims and administration.
- Co-ordinate and maintain a list of approved contractors and suppliers to ensure best value.
- Support the Chief Finance Officer and Trust Operations Manager with the review and monitoring of all contracts, leases and relationships with external contractors.
- Assist with monitoring expenditure on capital projects such as any Condition Improvement Funds.
- Maximise investment returns and income generation; supporting bids, sales, sponsorship and fundraising as appropriate.
- Be responsible for the Trust and schools' asset registers ensuring that they are maintained and regularly updated.
- Ensure that all necessary returns, reports and documentation are completed accurately within time constraints including claims, bids, assist with reports to Trustees, and statistical returns (internal and external).

Personnel:

- Oversee arrangements for the induction and training of all new staff within the finance team.
- Undertake the appraisal of all staff within the finance team.
- Oversee the effective deployment and management of all staff within the finance team
- Play an active role in the recruitment of finance staff in accordance with the Trust procedures.

Administration:

- Ensure that all administrative duties, checks, documentation, reports and returns (internal and external) are completed accurately and submitted within required deadlines.
- Collate information, statistics and prepare reports as required.
- Undertake responsibility for all necessary administration relating to finance processes and procedures.
- Ensure that all manual and computerised records and filing systems are maintained as required.
- Process, input, extract and analyse information from the Trust and schools' system(s).
- Ensure compliance with GDPR regulations.
- Deal with correspondence promptly and as required.

Other Duties and Responsibilities

All Trust staff are expected to:

- Take appropriate responsibility and action for safeguarding.
- Be prepared to provide additional support to the central Trust team and schools of the Trust as required.
- Support the vision and values of the Trust and demonstrate a collaborative team working approach to school and Trust improvement.
- Promote and act in accordance with the Trust's Staff Code of Conduct and all key policies.
- Maintain high professional standards of attendance, punctuality, appearance, conduct and positive, courteous relations with students, parents/carers, colleagues and visitors.
- Work within the Trust's Equality Objectives to promote equity for all students and staff, both current and prospective.
- Work within the Trust's Health and Safety policy to ensure a safe working environment for staff, students and visitors to our schools.
- Attend Trust and school events as required and make a positive contribution during such events.
- Participate in training and learning activities and staff appraisal as required.
- Be proactive in seeking appropriate advice and guidance where required.
- To undertake any other duties commensurate with the grading of the post as directed by the Chief Executive Officer.



PERSON SPECIFICATION

Trust Finance Manager

	METHOD OF ASSESSMENT	ESSENTIAL / DESIRABLE
1. Qualifications		
AAT or NVQ level 4 in Finance/Business/Administration	A/C/I	Essential
Evidence of continued professional development	A/C	Essential
2. Experience		
Working in a senior role in a finance function of a large, complex organisation, preferably Local Government or Schools	A/I	Essential
High level experience of implementing and using a range of software packages for financial administration e.g. word and excel	A/I	Essential
Experience of using complex database programmes	A/I	Essential
Experience of maximising the use of and implementing computerised financial systems	A/I	Essential
3. Knowledge		
Knowledge of a wide range of financial procedures, including order and invoice processing, bank reconciliations, financial reports and account monitoring	A/I	Essential
A detailed understanding of the funding and financial management of schools, including their information systems	A/I	Desirable
A broad understanding of the legislation and funding arrangements relevant to Local Government	A/I	Desirable
Knowledge of a range of complex office and/or financial procedures	A/I	Essential
Knowledge of developing, implementing and maintaining administrative and/or financial processes	A/I	Essential
Experience of writing strategic reports on financial facts that clearly identify the potential impact(s) or consequence(s) on the business	A/I	Essential
Experience of demonstrating, guiding or advising on standard procedures and processes	A/I	Essential

4. Skills & Abilities		
Ability to communicate effectively with Headteachers, Governors and school staff and other colleagues both verbally or in writing, selecting appropriate media	A/I	Essential
Ability to present financial data and/or information in a format easily understood by managers of a non-finance background.	A/I	Essential
Self-motivated with ability to prioritise and manage own workload over extended periods, producing accurate work within deadlines and with minimal supervision and manage the workload of others.	A/I	Essential
Ability to quickly identify existing or potential business problems with significant financial consequences and present short to medium term solutions.	A/I	Essential
Ability to motivate and develop staff	A/I	Essential
Ability to constantly improve own practice/knowledge through self-evaluation and learning from others	A/I	Essential
Full understanding of the need to maintain confidentiality in both written and verbal communications	A/I	Essential
Flexibility to adapt to changing workload demands and new school challenges	A/I	Essential
5. Attitude and Approach		
Smart, professional appearance.	I	Essential
Positive and proactive approach to continuous improvement.	A/I	Essential
A willingness to undertake additional training, keep up to date with developments and changes in good practice.	A/I	Essential

*** Method of Assessment**

A = Application form, **C** = Certificate, **I** = Interview, **T** = Task



ADDITIONAL INFORMATION

BENEFITS

- ❖ An engaging, creative and welcoming environment.
- ❖ Holiday entitlement of 26 days, plus Bank Holidays, increasing to 31 days after five years of service.
- ❖ Membership of Greater Manchester Pension Scheme, with excellent employer contributions.
- ❖ Free on-site parking.
- ❖ On-site canteen facilities.
- ❖ Staff room with free refreshments.
- ❖ Employee Assistance Programme.
- ❖ Occupational Health and Counselling services available.
- ❖ Supported by a talented, highly motivated, committed and professional team of colleagues.
- ❖ Active and supportive Governing Bodies and Senior Leadership Teams.
- ❖ CPD opportunities for all staff.
- ❖ A great place to work.

APPOINTMENT TERMS

South Manchester Learning Trust is committed to safeguarding and promoting the welfare of children and young people and expects all staff to share this commitment.

We fully support staff professional development and expect staff to be proactive in this area.

To be considered for this position, your application form should be completed in full by 12:00 midday on **Tuesday 8 October 2024**. Please note that we are unable to accept applications unless they are made on our own application form. Due to the large number of applications we receive, please be aware that only shortlisted candidates will be contacted to be invited for an interview.

If your application is successful, employment with the Trust is conditional upon the completion a DBS Disclosure Application, receipt of two satisfactory employment references and a satisfactory pre-placement medical assessment. Any criminal record information that is disclosed to the Trust will be handled in the strictest confidence. Persons barred from working with children will not be considered for this post.

South Manchester Learning Trust is committed to Equity and Equality of Opportunity and welcomes applications from all sections of the community.

CONTRACTUAL MATTERS

- ❖ The successful candidate will be expected to take up the appointment as soon as possible.
- ❖ The post is based on 36.25 hours per week. The post is a salaried position and overtime is not paid unless due to exceptional circumstances.
- ❖ The holiday year runs from 1 September to 31 August each year.
- ❖ The position will be based at Altrincham College working alongside the rest of the finance team, but travel to other schools may be required from time to time to offer support when needed.
- ❖ All our schools operate a no-smoking policy on the whole of its sites.

Thank you for your interest in a position within South Manchester Learning Trust. We believe that applying for a new role should always be seen as a two-way process, you have to be right for us, but the trust also has to be right for you. So, if you are interested and would like any more information about the role or our Trust, please email smlt-recruitment@altrinchamcollege.com.