



COLLABORATIVE LEARNING TRUST

Working Together to Secure Success



TRUST FINANCE MANAGER

INFORMATION FOR APPLICANTS

37 Hours Per Week
Permanent – All Year Round

NJC Grade PO4 Scale Points 35-38
Actual Salary £46,142 - £49,282 Per Annum
(£47,664 - £50,908 NJC pay award pending)

Required September



TRUST FINANCE MANAGER

Locations: Collaborative Learning Trust central team

Contract: 37 Hours per Week
Permanent – All Year Round

Closing Date: Wednesday 8th July 2026 at 23:59

Selection Day: Monday 13th July 2026

TRUST FINANCE MANAGER

Thank you for your enquiry regarding this post.

Please look on the Trust website [Collaborative Learning Trust education trust](#) for more information about our Trust and for relevant policies e.g. Child Protection etc.

You will find in this booklet:

- Information about the post
- Information from the CEO
- Job Description
- Person Specification
- Guidance for completing the application form

If you have a disability and require this information in a different format, for example, Braille, larger print or on CD, please contact the trust:

01943 262203

The closing date for applications is **Wednesday 8th July 2026 at 23:59**. Please note that it is our policy not to accept late applications. Shortlisting will commence immediately with interviews anticipated to take place **Monday 13th July 2026**.

Following the closing date, a recruitment panel will review the information provided and consider how well it matches the person specification. Shortlisted candidates will then be invited in for interview and references taken. On the interview day a number of sessions may be organised which may include completing a data or written task, producing a presentation, meeting with students or, dependent on the role, a combination of the above. The results of these sessions will inform the panel in their decision to take candidates through to a formal interview.

The school is committed to safeguarding and promoting the welfare of our students and expect all staff and volunteers to share this commitment. All appointments will be subject to an Enhanced Disclosure and Barring Service check.

We aim for diversity within our workforce. Applications are welcome from all, irrespective of sex, sexual orientation, gender identity, race, religion or belief, marital status, age or disability.

All Collaborative Learning Trust schools are non-smoking/vaping sites.

Please note it is the Trust's policy that reimbursement will not be made with regard to candidates' expenses.

INFORMATION ABOUT THE POST

Trustees are seeking to appoint, as soon as possible, an experienced, knowledgeable, and ambitious individual to lead on Financial Management within our busy Trust shared services Finance Function. Recent Trust growth means this is an exciting time to join, and the successful candidate will be expected to partner with the Chief Finance and Operations Officer to ensure the best possible support for our Trust schools, driving the effective management of Trust resources and ensuring the optimal financial processes to support this. Managing the budgets, forecasts and financial reporting for our 9 schools, you will be required to partner closely with specific schools within the Trust, whilst understanding and consolidating the financial budgets and reporting for the whole organisation.

This is a diverse role, which will involve working with stakeholders right across the Trust and will require an ability to influence and connect with staff at all levels of our organisation. Within this role you will be responsible for ensuring compliance with both statutory reporting requirements and the Trust's financial policies. To secure this role you will need to be a fully qualified, or qualified by experience finance professional, with an ability to apply an analytical and commercial mindset to a public service function.

INFORMATION ABOUT COLLABORATIVE LEARNING TRUST

Currently the Trust comprises:

1. Prince Henry's Grammar School, Otley, Leeds
2. Bramhope Primary School, Bramhope, Leeds
3. St Mary's Church of England Primary Academy, Hunslet, Leeds
4. Micklefield Church of England Primary Academy, Micklefield, Leeds
5. All Saints Church of England Primary School, Little Horton Green, Bradford
6. Trinity All Saints Church of England Primary School, Bingley
7. Ashfield Primary School, Otley, Leeds
8. St Oswald's Church of England Primary School, Guiseley, Leeds
9. The Whartons Primary School, Otley, Leeds

VISION

The Collaborative Learning Trust will be recognised as a highly successful learning community that provides outstanding, sustainable, and inclusive 'nursery to 19' education for young people of all abilities. Students will leave Collaborative Learning Trust schools having enjoyed their education and developed into lifelong independent learners with the creativity, adaptability, resilience and leadership skills to contribute to, and succeed in, our 21st century society.

Our vision is underpinned by the following values:

- **Education for the common good of the whole community** – supporting the development of lifelong independent learners with the creativity, adaptability, resilience and leadership skills to contribute to society
- **Education for dignity and respect** – a focus on equality for all, trust, integrity, respect and an appreciation of diversity
- **Education for wisdom, knowledge and skills** – high quality teaching and learning designed to secure the 'all round' education of young people and engender a passion and enthusiasm for learning
- **Education for hope and aspiration** – a culture of aspiration and success (in students, staff and governance)

This will be achieved through:

- A commitment to a genuinely collaborative approach to ensure sustained school improvement towards the vision
- Strong ethical leadership and behaviour at all levels
- Autonomous ethos and identity for each school, whilst sharing core values and vision across both church and non-church schools
- Effective staff professional development and opportunities for excellent practitioners to develop their career

'We as a Trust have signed up to the Yorkshire and Humber climate action pledge, making a commitment to protecting the climate and nature'

COLLABORATIVE LEARNING TRUST EMPLOYEE BENEFITS

The collaborative Learning Trust promotes employee wellbeing across all of our schools. One of the many ways we implement this is through our fantastic employee benefits which include:

Employee Assistance Programme:

A 24/7 confidential advice and counselling helpline available at no cost to all employees.

Pension Scheme:

We offer a fantastic teaching and support staff pension scheme.

Cycle to work scheme:

Spread the cost of a new bike over 12 or 24 months through salary sacrifice (terms and conditions apply).

Tech scheme:

Spread the cost of a Curry's or Ikea gift card over 12 months through salary sacrifice (terms and conditions apply).

bYond:

A pre-paid card that lets you earn cashback when shopping at your favourite stores.

Extras discounts:

Save up to 10% on the upfront cost of a wide range of big-brand gift cards.

Tastecard Promotions:

Discount on an annual subscription which allows you to Save up to 50% off at hundreds of participating restaurants.

RAC Membership Cover:

A 12 month salary sacrifice offering different levels of cover options for up to 4 vehicles (terms and conditions apply).

INFORMATION FROM JANET SHERIFF: CEO, COLLABORATIVE LEARNING TRUST

Dear Prospective Applicant

On behalf of the Collaborative Learning Trust, I would like to thank you for your interest in applying for the post of Trust Finance Manager.

The Trust Finance Manager plays a critical role in supporting Trust schools and ensuring the integrity of the budgets, forecasts and external and internal financial reporting, so that all schools receive maximum benefit from being part of the Collaborative Learning Trust. Leading the Business Partnering side of this busy and growing Central Finance Team, the post holder will have an excellent insight into all aspects of financial management within the Education sector. The role requires a fully qualified or qualified by experience finance professional with excellent interpersonal skills, the skills to manage process change and an ability to apply an analytical and commercial mindset to a public service function.

The person appointed to the role will be supported by innovative and collaborative networks and high-quality professional development, available from within the Collaborative Learning Trust (www.collaborativelearningtrust.com) and through membership of the Red Kite Teaching School Alliance (www.redkitealliance.co.uk) and Red Kite Teaching School Hub redkitetsh.co.uk.

Applicants are welcome to meet with the Trust's Chief Finance and Operations Officer to discuss the role. Please email to arrange a meeting:

kate.owen@collaborativelearningtrust.co.uk

I hope that after reading the information about this vacancy you will want to apply. Please clearly describe your relevant skills & abilities, knowledge and experience (see Person Specification) in the appropriate sections of the application form and explain why these make you an ideal candidate for this post. I look forward to receiving your application.

Yours faithfully

Janet Sheriff

CEO and Executive Headteacher, Collaborative Learning Trust

JOB DESCRIPTION: TRUST FINANCE MANAGER

Name:	
Job Title:	Trust Finance Manager
Salary Grade:	NJC Grade PO4 Scale Points 35 – 38 Actual Salary £46,142.00 - £49,282.00 Per Annum (£47,664 - £50,908 NJC pay award pending)
Contract Type:	37 Hours per Week Permanent – All Year Round
Responsible to:	Chief Finance and Operations Officer
Working Hours:	37 Hours per Week Monday to Thursday 08:30 – 16:30 Friday 08:30 – 15:30 30-minute unpaid break each day Some home working available upon successful completion of probation

PURPOSE OF ROLE

To take responsibility for the accurate and timely completion of the consolidated monthly management accounts, budget and forecast for the Trust, providing high quality analysis, commentary and ensuring compliance with the Trust’s financial procedures. The role has direct accountability for the Trust’s consolidated financial picture and will also be the key point of contact for a number of Trust schools, whilst retaining the oversight of the financial picture across the remaining schools. The postholder will be expected to pro-actively liaise with our School Heads and finance team to provide the support they need in managing their financial position, whilst also setting the Trust direction for reserves, assumptions, and ensuring the Trust’s ongoing financial viability.

Main Duties and Responsibilities

- To accurately prepare, analyse and interpret complex financial information including budgets, income and expenditure reports, financial forecasts, and other reports as required
- To ensure accurate management accounts are prepared to deadlines and that these are provided on time to academies, senior management and Trustees, thus enabling effective budgetary control, decision making and sound financial planning
- To provide reports to senior management and the Trust Board on Financial Key Performance Indicators
- Take responsibility for completing the month end routine to an agreed timetable and to agreed standards
- Provide high quality leadership and management of the Trust’s consolidated monthly management accounting process, ensuring sales invoices, income, purchase ledger invoices and journals are appropriately reflected
- Maintain and enhance the Trust’s reporting processes around grant funding, School Condition Allocation tracking, and fixed asset accounting

- To manage school and department level income and expenditure budgets across the Trust to identify any potential financial risk and implement strategies to address issues arising.
- Ensure that the management accounts provide concise and informative commentary for all stakeholders, including but not limited to, Trust Board, Local Governing Committees, Headteachers and senior leaders
- Oversee the Trust's monthly reforecasting process, ensuring all school forecasts are accurately updated in line with changes to staffing, incomes, costs and key assumptions
- Manage and consolidate the Trust annual 3-year budget, leading on budgeting and accounting assumptions, ensuring these are based on industry guidance and the latest strategic thinking
- To manage the Trust's overall reserves, supporting Trust schools to maintain / move towards their targeted reserves position, whilst at all times ensuring schools deliver a high-quality provision
- Prepare the Trust's annual budget forecast return to the Department for Education, ensuring appropriate engagement and sign-off on this budget at school and Trust level
- Business partner with designated Trust schools, taking the lead on their financial management, budgeting and forecasting. Liaison with Headteachers to ensure successful delivery of their school improvement plans within the Trust's financial framework
- Attend specific Trust Board and local governing committees to communicate the financial position to governors.
- Complete monthly headcount reconciliations to ensure accuracy of payroll and headcount forecasting, liaising with schools and HR as appropriate.
- Produce and review the key benchmarking statistics, flagging any areas of concern and providing advice to optimise these, given careful consideration of the school context.
- Ensure contracts management system is up to date, liaising with Central Finance and school admin when required.
- At all times, ensures all financial activities within the schools are carried out in line with the Trust's financial procedures and comply with the Academy Trust Handbook.
- Keep abreast of funding, legislative and other changes in the educational environment and ensure the Headteachers and Local Governing Board remain fully informed
- To work closely with auditors for both internal and external audit requirements, and assist the CFOO with the production of the annual, audited accounts and the Academy Accounts Return
- To keep the Trust's Asset Register up to date and provide calculations for depreciation and Net Book Value of Trust assets
- Consolidate the Trust's risk register on a termly basis, providing updates for the Audit, Risk and Finance committee and liaising with Headteachers and senior leaders as appropriate

- To manage the Trust's insurance provision, ensuring adequate levels of cover across the Trust

Team

- In the absence of the CFOO, manage the Trust finance team.

Policies and Procedures

- To support leaders and school office staff with all aspects of Trust finance
- To maintain, advise on and oversee all Trust Financial Policies and support Headteachers, Office Managers and admin staff with their implementation
- To promote financial awareness and financial compliance throughout the Trust.
- To interpret matters of policy, procedure and statute, and ensure the Trust's compliance and initiate appropriate action arising. Support in the training and quality assurance of Academy finance staff.
- To own the day-to-day administration and set up of the Trust's financial systems

Supporting the Organisation

The Trust Finance Manager will be expected to:

- Always make decisions and act in line with the vision and values of the Trust
- Maintain the confidential nature of information relating to the Trust, its schools, pupils, staff, parents and carers.
- Contribute to a culture of challenge and support – demonstrating ambitious expectations for all aspects of the Trust
- Participate in the Trust's professional growth process and seek to develop further skills through professional development opportunities, attending Trust training events as appropriate
- Be aware of and comply with policies and procedures relating to child protection, health, safety and security and confidentiality, reporting all concerns to an appropriate person
- Be aware of and comply with the Code of Conduct, regulations and policies of the Trust
- Be aware of equal opportunities legislation and, along with colleagues, ensure that the Trust complies with its requirements
- Carry out any other duties commensurate with the post as directed by the CFOO

It should be noted that this is a Collaborative Learning Trust Central Services role. The role is based in Otley, but the day-to-day work will involve travelling to Trust schools across the region.

Job descriptions may change and/or be amended, the postholder may be required to fulfil other duties commensurate with the role.

HEALTH & SAFETY

All staff will make themselves familiar with the requirements of the Health and Safety Policy which are relevant to their work.

SAFEGUARDING

Collaborative Learning Trust is committed to promoting and safeguarding the welfare of all children and expect all staff and volunteers to share this commitment. This post is subject to an enhanced Disclosure and Barring Service (DBS) checks.

In line with KCSiE 2025, we will carry out an online search as part of our due diligence on shortlisted candidates. This may help identify any matters that are publicly available online, which we might want to explore with you at interview.

Signed

Date.....

PERSON SPECIFICATION – TRUST FINANCE MANAGER

Title of Post		Trust Finance Manager	
Specification Prepared By		CFOO	
Date		June 2026	
Qualifications		Essential/Desirable (E/D)	How identified
1.	English & Mathematics GCSE Grade A*-C or equivalent	E	Application and Selection process
2.	High level of numeracy/literacy skills	E	
3.	Strong ICT skills including training in specific applications such as spreadsheets	E	
4.	Relevant professional qualifications, ACCA or CIMA	E	
5.	Degree level qualification	E	
Experience and Professional Development		Essential/Desirable (E/D)	How identified
1.	Experience in a school/academy/MAT setting	D	Application and Selection process
2.	Experience of Microsoft products such as Word and Excel	E	
Knowledge		Essential/Desirable (E/D)	How identified
1.	Up to date knowledge of Academy Trust Handbook and financial requirements for Multi-Academy Trusts	D	Application and Selection process
2.	Knowledge of Financial regulations governing Multi-Academy Trusts	D	
3.	Knowledge of Financial software packages such as Sage	D	
4.	Knowledge and experience of Management Information Systems used in schools	D	

Skills and Abilities		Essential/ Desirable (E/D)	How identified
1.	Ability to communicate effectively (both orally and in writing) to a range of stakeholders and audiences	E	Application and Selection process
2.	Ability to support and maintain the vision and values of the Trust	E	
3.	Ability to manage own workload to meet conflicting demands to ensure completion of tasks to deadlines	E	
4.	Excellent organisational skills, with the ability to keep accurate and appropriate records	E	
5.	High level of ICT skills and ability to use these effectively in the role	E	
6.	Ability to think logically and calmly when under pressure	E	
7.	Ability to develop strong working relationships with colleagues, demonstrating a high level of interpersonal skills	E	
8.	Ability to maintain discretion and confidentiality	E	
9.	Ability to use creativity and initiative to solve problems and develop better ways of working	E	
Personal Attributes		Essential/ Desirable (E/D)	How identified
1.	A commitment to positive teamwork and collaboration to achieve results	E	Application and Selection process
2.	A commitment to continuing professional development	E	
3.	A high standard of professional appearance	E	
4.	Adaptability to changing circumstances and new ideas	E	
5.	A sense of humour and perspective	E	
7.	An appetite and stamina for challenging work	E	
8.	A solution-focused mindset and determined “no excuses” approach to raising standards	E	

9.	Commitment to upholding the schools' and the Trust's ethos, values, policies and procedures	E	
10.	Promote a positive health and safety culture across the Trust.	E	
11.	Ability and desire to learn new skills and to take part in further training	E	
12.	Commitment to continued professional development	E	
Equal Opportunities		Essential/Desirable (E/D)	How identified
1.	Acceptance of, and a commitment to, the principles of the schools' and the Trust's equal opportunities policies and practices as they relate to employment issues and to the delivery of services to the students and community	E	Application and Selection process
2.	Commitment to equal opportunities policies relating to all protected characteristic in an educational context	E	
Safeguarding		Essential/Desirable (E/D)	How identified
1.	Ability to form and maintain appropriate relationships and personal boundaries with children and young people	E	Selection process and completion of an Enhanced DBS check
2.	Has appropriate motivation to work with children and young people and can relate to them	E	
3.	Displays commitment to the protection and safeguarding of children and young people	E	
4.	Good knowledge and understanding of the importance of safeguarding students and the welfare of staff and the action to take to support this	E	
Personal Circumstances		Essential/Desirable (E/D)	How identified
1.	Legally entitled to work in the UK	E	ID
2.	No contra-indicators in personal background or criminal record in showing unsuitability to work with children/young people/ vulnerable clients/ finance	E	Completion of Criminal Background declaration and

			Enhanced DBS check
3.	Willingness to complete a Pre-Employment Health Declaration if appointed	E	Pre-Employment Health Declaration
4.	Willingness to work additional hours, occasionally, if required for the successful operation of the Trust	D	

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GUIDANCE FOR COMPLETION OF THE ON-LINE APPLICATION FORM

Please complete the application form in full, giving as much information as possible and answering **all** questions before submitting the application.

REFERENCES

Please supply details of two referees, one of which must be your current or most recent employer. If you are currently working in a school setting then one of the referees must be the current Headteacher. Friends and family cannot be used as referees.

If you are not currently working with children, but have done so in the past, then an additional reference from that employer will be required.

Safer Recruitment procedures require that we contact at least one referee before interview.

EMPLOYMENT HISTORY

Please list previous appointments in sequence, current or most recent first. Please include your salary grade in the Position Title e.g.. Reception Teacher M4 + TLR2A. Please also include at the end of the Responsibilities section the reason why you left the post e.g. promotion, relocation etc. Please also list other work experience and the details and nature of the work/activity. If you were not in work at any time please give details of what you were doing e.g. Gap Year Jan 2011-Jan 2012, Unemployed July 2010–December 2010 etc.

EDUCATION HISTORY

Please ensure that you advise all your qualifications, in date order current or most recent first, including those obtained at school. Please advise the grade achieved with regard to degree qualification i.e. BA in History 2:i. Please list all A levels together in one box and in another box list all GCSEs together, along with the grades obtained.

OTHER COURSES OR PROFESSIONAL DEVELOPMENT

Please include any professional development that may be relevant including dates and grades obtained.

INFORMATION TO ADDRESS THE PERSON SPECIFICATION

Please use the sections provided to detail your Skills & Abilities, Knowledge and Experience as described in the Person Specification and relevant to the Job Description. You can use the Additional Information section to detail anything else that you feel is relevant to the role and why you feel you would be an ideal candidate for this post.

STATEMENT ON THE RECRUITMENT OF EX-OFFENDERS

- As an organisation which is exempt from the Rehabilitation of Offenders Act and using the Disclosure & Barring Service to assess applicants' suitability for positions of trust, we comply fully with the DBS Code of Practice and undertake to treat all applicants for positions fairly. We do not discriminate unfairly against any subject of a Disclosure on the basis of conviction or other information revealed.
- We are committed to the fair treatment of our staff, potential staff or users of our services, regardless of race, gender, religion, sexual orientation, responsibilities for dependants, age, physical/mental disability or offending background
- We actively promote equality of opportunity for all with the right mix of talent, skills, and potential and welcome applications from a wide range of candidates, including those with criminal records. We select all candidates for interview based on their skills, qualifications, and experience.
- All applicants who are offered employment in a school will be subject to an Enhanced Disclosure and Barring Service (DBS) check. This will include details of cautions, reprimands and warnings as well as spent and unspent convictions. An enhanced disclosure may also contain non-conviction information from local police records which a chief police officer thinks may be relevant. A statement advising that a Disclosure will be requested in the event of the individual being offered the position will be shown in all job adverts and recruitment packs.
- We can only ask an individual to provide details of convictions and cautions that we are legally entitled to know about. Applicants must therefore disclose all spent and unspent convictions, cautions, reprimands and final warnings that are not 'protected' (i.e. filtered out) as defined by the Rehabilitation of Offenders Act 1974 (Exceptions) order 1975 (as amended in 2013).
- We ensure that staff involved in recruitment have received appropriate guidance on the relevant legislation relating to the employment of ex-offenders (e.g. the Rehabilitation of Offenders Act 1974 and its amendments in 2013) and know how to access advice and support.
- You will have the opportunity for an open and measured discussion on the subject of any offences or other matter that might be relevant to the position. Failure to reveal information that is directly relevant to the position sought could lead to withdrawal of an offer of employment or disciplinary action which could result in dismissal.

- We make every subject of a DBS check aware of the existence of the DBS Code of Practice and make a copy available on request.
- We undertake to ensure that any matter revealed in a Disclosure is discussed with the person seeking the position before withdrawing a conditional offer of employment.

Having a criminal record will not necessarily bar you from working with us. This will depend on the nature of the position and the circumstances and background of your offences.



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www.collaborativelearningtrust.com

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