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# Trust Finance and Business Manager Swanland Education Trust (SET)

Application Pack

# Contents

Welcome Letter.....	3
Advertisement.....	4
Ethos and Vision.....	5
Job Description.....	6
Job and Person Specification.....	8
Explanatory Notes .....	10
Safeguarding Children & Young People .....	10
Interview Process .....	10
Conditional Offer: Pre-Employment Checks.....	11

# Welcome Letter

Dear Applicant

Thank you for expressing an interest in our position of Trust Finance and Business Manager, working within the Swanland Education Trust family of Schools.

Swanland Education Trust (SET) is an Multi Academy Trust (MAT) originally formed in August of 2011 as a Single Academy Trust. In May of 2013, it converted its legal status to a MAT and incorporated Dunswell Academy into its family.

Since then the journey has been both exciting and interesting. The Trustees and I have been working behind the scenes to develop and establish systems and structures that will enable the Trust to grow and increase its influence within the area. Having now reached this stage in our development we are looking to appoint to this crucial role within the Trust.

The role of Trust Finance and Business Manager will provide strategic direction, vision and clarity for finance and admin teams working across the Trust and its individual academies. It will also involve working within a team of staff to support and embed new academies joining the Trust.

You will be responsible for all aspects of the Trust's financial and business activity, and will be expected to make a direct contribution to defining strategic priorities that will shape the future of the Trust. In the early stages this will include undertaking some lower level duties, alongside providing training and assistance to School Business Managers. You will be reporting directly to the Chief Executive Officer.

The post will be based at the Trust's offices at Biz-Hub – Melton Court, Melton, East Riding of Yorkshire. However, there will be the requirement to travel to other academy sites.

You will be joining a highly innovative, inspirational and ambitious organisation, so we are seeking an outstanding candidate who can offer the highest possible quality of services to realise our educational vision. The successful candidate will provide strong leadership and effective support to colleagues, to enable the organisation to achieve the best possible outcomes for our children.

I believe this to be an exciting and very rewarding role with many opportunities to help shape the future direction of this Trust. I would request that candidates who will be making an application, contact me for an informal discussion about the post. We look forward to receiving your application.

Yours faithfully

Chris Huscroft  
CEO

# Advertisement

## Trust Finance and Business Manager

Required: 1<sup>st</sup> March 2018 (or as soon after this date as possible)

Salary: £37,306 to £41,025 (with attractive defined benefit pension scheme)



Swanland Education Trust, based in the East Riding of Yorkshire, is a Multi Academy Trust with the potential to grow. The Trust, at present, comprises of two primary schools, with two additional primary schools currently undergoing the conversion process to join our Trust in Spring 2018. These schools are geographically located within 30–40 minutes travelling distance of one another.

**At this very exciting time in our development as a Multi Academy Trust, we are now seeking to recruit a Finance and Business Manager, from March 2018.**

We believe this is a unique opportunity for the right candidate to join a rapidly developing leadership team. Working under the direction of the CEO, the role will offer the fantastic prospect of undertaking a strategic leadership role within the Trust and working as part of a trust-wide strategic leadership team.

The successful candidate will have outstanding leadership and communication skills and will play a key role within our organisation, whilst ensuring the Trust's continued growth and success.

The successful candidate will be a qualified accountant (with a professional accountancy qualification and resulting CPD: ACA, ACCA, CIMA or equivalent qualification) with a strong track record of effective financial management and secure knowledge and understanding of business administration. The candidate will be experienced in working in a medium/large organisation, and able to lead, inspire, collaborate and challenge.

Candidates interested in applying for this post can find out more by downloading the full Job Description with Person Specification from <http://swanlandeducationtrust.co.uk/vacancies>. They would be strongly advised to make an appointment to chat with or meet the CEO.

It is intended to hold interviews during the week commencing 5<sup>th</sup> February. Candidates are requested to submit applications by midday on Friday 2<sup>nd</sup> February 2018. A Letter to the Applicant is included in this pack and a downloadable application form is available from our website; submissions are welcomed by post to the following address: c/o Swanland Primary School, Tranby Lane, Swanland, East Riding of Yorkshire HU14 3NE, or via email to: [jobs@swanlandeducationtrust.co.uk](mailto:jobs@swanlandeducationtrust.co.uk)

SET is committed to safeguarding and promoting the welfare of children and young people and requires all staff, governors and volunteers to share this commitment.

# Value, nurture and fulfilment through support, harmony and praise.

At Swanland Education Trust (SET), our vision is at the core of our existence. We want to ensure that every child within the Trust is able to have equal access to the best education. This will mean collaboration between schools and other MATs, who share in our core vision and will be instrumental in achieving the following aims:

- Our Trust aims for all its schools to become outstanding under the OFSTED definition of the day;
- Our Trust aims to improve outcomes and life chances for the young people in its schools;
- Our Trust aims to impact positively upon the communities that are served by its schools;
- Our Trust aims to increase its influence in Yorkshire and the Humber region;
- Our Trust aims to contribute to system-wide improvement in education.

The advertised role will be an integral part of delivering this vision, supported by policy, practice and governance.

# Job Description

Trust Finance and Business Manager

**Salary:** £37,306 to £41,025

**Employed by:** Swanland Education Trust

**Responsible to:** CEO and the Board of Trustees

**Location:** Trust offices and schools within the Trust



## Core Purpose:

The core purposes of this role are:

- to contribute to the wider strategic development of SET schools;
- to be responsible for the all aspects of Finance within SET;
- to deploy and monitor the effectiveness of resources of SET schools;
- to lead in the design and implementation of policies, systems and procedures to ensure compliance in legislation relating to the MAT.

## To achieve success, the Trust Finance and Business Manager will:

- work closely with the CEO to ensure that the core purposes of the role are delivered to the highest possible standard;
- to ensure that all aspects of the Trust's work can be delivered through the procurement and management of contracts (including insurances etc) to ensure best value and high levels of service;
- attend and report to the Board of Trustees and their committees, advising them when requested and following up all issues afterwards, as agreed;
- attend full governing body meetings in an advisory capacity, when necessary;
- be a member of the Trust's Executive Leadership Board, ensuring that decision making is part of a shared process;
- act as Company Secretary for the Trust;
- be the Trust's designated Data Protection Officer.

## Executive Leadership duties:

- in conjunction with each School's Head Teacher, provide clear leadership and direction for all School Business Managers within the Trust, including the management of their personal development through a robust appraisal process;
- ensure that information is shared regularly with SBMs, within the Trust, to ensure they are able to meet the needs of their individual schools;
- provide feedback to the Executive Leadership Board.

## Finance

- Develop and implement an appropriate overall risk management strategy for the Trust;
- Ensure sound financial governance is in place;
- Review and evaluate monthly management reports received from each school in relation to budgets;
- Obtain explanations from SBMs for significant variances and take investigative and corrective action as appropriate;
- Prepare consolidated monthly management information to evaluate the financial performance and position of each school and the Trust as a whole on a timely basis;
- Oversee the preparation of financial information for submission to the ESFA;
- Prepare financial forecasts for the Trust to ensure financial sustainability;

- Manage cash resources efficiently through treasury management;
- Perform financial due diligence to assess the financial viability of potential schools joining the Trust;
- Ensure the consistent application of accounting policies and procedures throughout all schools in the Trust;
- Liaise with internal and external auditors and take appropriate action as a result of their recommendations.

#### **Administration:**

- oversee the efficient administration of all business for the Trust and its schools whilst providing leadership to the administrative teams;
- ensure the Trust effectively discharges its statutory responsibilities with regard to relevant Company and Charity law which will include ensuring that all relevant information is provided to necessary bodies e.g. Companies House, EduBase, DfE, ESFA, HMRC etc;
- ensure appropriate clerking arrangements are in place for Trust and school committee meetings;
- be responsible for the management of procedures which comply with statutory requirements such as Data Protection and the Freedom of Information;
- ensure that funding streams available to the Trust and its schools are accessed;
- manage the development, maintenance and review schedule for Trust and school Policies.

#### **Human Resources**

- to liaise with the Trust's appointed HR advisors in all HR matters;
- establish and be responsible for a HR support service that will manage general HR matters including the implementation and administration of recruitment, contracts of employment, staff attendance, staff discipline and maintenance of confidential records;
- to advise the CEO and Trustees of all relevant HR legislation which in turn will help to formulate a clear policy;
- in consultation with Head Teachers and governors, ensure implementation of policy and procedure in Trust schools;
- to be responsible for quality assuring the single central record for each Trust schools;
- regularly review appraisal process to ensure fit for purpose and develop as necessary, in-line with Trust policy (for business/admin support staff);
- manage all aspects of the sickness management process for all staff;
- ensure that the Payroll service provided to the Trust is fit for purpose and in line with the specific needs and requirements of the individual schools, intervening and problem solving if and when required;
- oversee the preparation of monthly/annual submissions to the Trust's pensions providers.

#### **Marketing and Collaboration:**

- contribute to the overall marketing strategy for the Trust and its schools;
- attend such meetings/events identified by the CEO or Head Teachers to represent the Trust and communicate the Trust's vision effectively – both internally and externally;
- contribute to the preparation of all marketing materials, documentation and web sites ensuring they are consistent and of a high standard.

The post holder will need to demonstrate a flexible approach in the delivery of work. Consequently, the post holder may be required to perform work not specifically identified in the job description, but which is in line with the general level of scope, grade and responsibilities commensurate with the post.

## Job and Person Specification

	Essential	Desirable	Assessment
<b>KNOWLEDGE/SKILLS/QUALIFICATIONS</b>			
Qualified accountant (ACCA, ACA, CIMA)	X		C
Appropriate school business qualifications		X	C A
Degree		X	C A
Knowledge of accounting software packages	X		A
Knowledge of academy policy and practice		X	A I
An understanding of strategic leadership in schools		X	A I
Knowledge of marketing strategies		X	I
Excellent IT skills	X		I
Ability to draft and edit documents	X		I
Ability to make presentations to the board and SLTs	X		I
Ability to use education management software		X	A
Ability to delegate and hold others to account	X		A I
An understanding of human resources processes		X	A I
Understanding of relevant employment and company law	X		A I
<b>EXPERIENCE</b>			
Working within an academy setting		X	A
Experience with Charity accounting	X		A
Experience of working within a complex business set up	X		A
Experience of managing other staff	X		A
Experience of procuring and monitoring quality services	X		A
Experience of completing bids for external funding		X	A
Ability to write strategic financial plans	X		A
Experience of working with the DfE, ESFA and other agencies		X	A
Experience of working with Trade Unions and Professional Associations in the public sector		X	A I
<b>PERSONAL QUALITIES</b>			
Ability to work under own initiative with sound personal, administration and time management skills	X		A I

Considerable personal enthusiasm, energy, integrity and professionalism	X		A I
Be flexible and open to change, enjoy working at a fast pace whilst maintaining professionalism and accuracy	X		A I
A dynamic team leader who has the ability to bring out the best in other people to achieve business outcomes	X		A I
Have access to a car and a full clean driving licence	X		A
<b>BEHAVIOUR AND OTHER RELATED CHARACTERISTICS</b>			
Commitment to self and team development	X		A
Work in ways that promote equality of opportunity, participation, diversity and responsibility	X		A I
A commitment to abide by and promote the Trust's Equal Opportunities, Health and Safety and Child Protection Policies	X		A

**Key to Method of Assessment**

- A Application
- I Interview and assessment
- R Reference
- C Certificate

## Explanatory Notes

Applications will only be accepted from candidates completing the Trust's Application Form. Please complete ALL sections of the Application Form which are relevant to you as clearly and fully as possible. CVs will not be accepted in place of a completed Application Form.

### Safeguarding Children & Young People

We are committed to safeguarding and promoting the welfare of children and young people. We expect all staff to share this commitment and to undergo appropriate checks, including enhanced DBS checks.

- Candidates should be aware that all posts in Swanland Education Trust involve some degree of responsibility for safeguarding children and young people, although the extent of that responsibility will vary depending on the nature of the post. Please see the job description enclosed in this Application Pack for further details.
- Accordingly, this post is exempt from the Rehabilitation of Offenders Act 1974 and therefore all convictions, cautions and bind-overs, including those regarded as "spent" must be declared.
- If you are currently working with children, on either a paid or voluntary basis, your current employer will be asked about disciplinary offence, including those related to children or young people (whether disciplinary sanction is current or time-expired), and whether you have been the subject of any child protection allegations or concerns and if so the outcome of any investigation or disciplinary proceedings. If you are not currently working with children, but have done in the past, that previous employer will be asked about these issues.
- Where neither your current or previous employment has involved working with children, your current employer will be asked about your suitability to work with children, although it may where appropriate be answered not applicable if your duties have not brought you into contact with children or young people.

### Interview Process

After the closing date, short listing will be conducted by a Panel, who will match your skills/experience against the criteria in the Person Specification. You will be selected for interview entirely on the contents of your application form, so please read the Job Description and Person Specification carefully before you complete your form. Owing to the number of applications we receive, it is not possible to contact all applicants to confirm if they have been successful in securing an interview. Therefore, please assume that if you do not hear from us by the interview date that, in this instance, you have been unsuccessful. We would like to thank you for taking the time to apply.

All candidates invited to interview must bring the following documents:

- Documentary evidence of right to work in the UK;
- Documentary evidence of identity that will satisfy DBS requirements such as a current driving licence including a photograph and/or a passport and/or a full birth certificate;
- Documentary proof of current name and address (i.e. utility bill, financial statement etc.)

- Where appropriate any documentation evidencing change of name;
- Documents confirming any educational or professional qualifications that are necessary or relevant for the post;

*Please note that originals of the above are necessary. Photocopies or certified copies are not sufficient.*

We will seek references on shortlisted candidates for Trust based positions and may approach previous employers for information to verify particular experience or qualifications before interview. Any relevant issues arising from references will be taken up at interview.

### Conditional Offer: Pre-Employment Checks

Any offer to a successful candidate will be conditional upon:

- Verification of right to work in the UK;
- Receipt of at least two satisfactory references (if these have not already been received)
- Verification of identity checks and qualifications;
- Satisfactory DBS Disclosure;
- Verification of professional status;
- Satisfactory completion of the probationary period (where relevant);
- Where the successful candidate has worked or been resident overseas in the previous five years, such checks and confirmations as may be required in accordance with statutory guidance.

To apply please complete the Swanland Education Trust application form. Your supporting statement should address and evidence the selection criteria detailed in the Person Specification.

**Closing Date:** 2<sup>nd</sup> February 2018      **Interviews:** w/c 5<sup>th</sup> February 2018

#### Applying:

Completed application forms may be returned in electronic format to:

[jobs@swanlandeducationtrust.co.uk](mailto:jobs@swanlandeducationtrust.co.uk)

If you would prefer to submit a paper application form, please return to:

Swanland Education Trust  
c/o Swanland Primary School  
Tranby Lane  
Swanland  
East Riding of Yorkshire  
HU14 3NE