

Tandridge Learning Trust

Candidate Pack

MAT Finance Manager

Surrey Pay S11

36 hours per week / 52 weeks per year

£43,638p.a. - £48,395p.a.

Working across Tandridge Learning Trust, based at
Warlingham School



Tithepit Shaw Lane, Warlingham, Surrey, CR6 9YB 01883 624067

www.tandridgelearningtrust.co.uk

Tandridge Learning Trust

Who are we?

Tandridge Learning Trust was established in May 2017 by a group of schools that understood the importance of local schools serving their local community, with common core values and the commitment to meeting the needs of every child. We recognise and respect the unique culture and ethos of each individual school and have high aspirations for every child and every school; sharing best practice and inter-school collaboration to improve teaching, learning and outcomes for children.

Vision

Aiming high together to flourish and achieve

Values

Commitment

Honesty

Kindness

Respect



Principles

- We respect and safeguard the unique culture and ethos of each individual school.
- We have high aspirations for every person and every school.
- We are committed to collaboration to create strong and sustainable schools.
- We provide environments where our children and staff feel happy, safe and valued.
- We develop confident, considerate and resilient members of the community.

Tandridge Learning Trust



Key Strategic Objectives

- Support all schools to achieve an Ofsted grade of at least good
- Considered expansion with an aim to grow towards 6-10 schools in the next 5 years
- Improve the operational efficiency of our organisation
- Enhancing the governance of the Trust Board
- Develop TLT branding and marketing strategy
- Development of an income generation strategy

CEO Message

The Trust provides robust challenge combined with relevant support for each school to ensure that every child, no matter their ability or circumstances, achieves their best possible outcomes. It also provides wider opportunities for students and staff by broadening the curriculum offer, sharing specialist staff and improving professional development. This broader curriculum and opportunities for development and movement within the Trust creates an attractive working environment and aids in staff recruitment and retention. The structure also provides more possibilities for robust succession planning and encourages the development of school leaders.



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By operating as a cross-phase Multi-Academy Trust, we can improve the transition between primary and secondary phases and thus raise learning outcomes.

Tandridge Learning Trust (TLT) is governed by a Trust Board, which is responsible for the strategic decision-making and financial prudence of the Trust. For more information about the Trust, please visit our website www.tandridgelearningtrust.co.uk.

I hope the information provided about this vacancy provides sufficient information to encourage you to take your application to the next stage. We look forward to hearing from you.

N.J. Bradwell

Nick Bradwell BA NPQH
Chief Executive Officer



Tandridge Learning Trust

MAT Finance Manager

TLT is a Multi-Academy Trust of five schools, consisting of one secondary and four primaries. A key objective of the Trust is to undertake considered expansion over the next five years, growing to between six and ten schools. To enable us to achieve this objective the Trust is restructuring its central operations team for the 2018-19 academic and financial year. Arrangements to support the year end and audit for the 17/18 financial year are already in place.

The MAT Finance Manager is responsible for the financial management and statutory reporting requirements of the MAT.

This will include:

- maintaining the financial accounting systems across the MAT, ensuring compliance with the Academies Financial Handbook and other key financial guidance and legislative requirements
- development, monitoring and implementation of appropriate financial policies and procedures across the MAT
- responsibility for all financial management and reporting at school level and consolidation of management accounts and statutory reporting for the MAT
- managing the transition process of converting schools

This will be an exciting opportunity for you if you are someone who enjoys working with a variety of people. The successful candidate must be able to rise to the technical financial challenge, as well as being able to communicate effectively with senior leaders and finance and business colleagues, enabling the best possible outcomes for children..

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Contact details and how to apply

Designated contacts for this vacancy:

Mr Nick Bradwell, Chief Executive Officer

Mrs Karen Quinton, Chair of Trust Board

Contact via Judith Standen (HR) on 01883 624067 ext. 2014

Email: vacancies@warlinghamschool.co.uk

Please complete the Academy's application form and return it electronically to the email address above. CV's will not be accepted. Please include a letter explaining how your experience to date equips you to successfully carry out the core responsibilities outlined in the job description.

Closing Date: Monday 22nd October 2018

Interview Date: Week Commencing 5th November 2018

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MAT Finance Manager – Job Description

Reporting to: The Director of Finance and Operations (DFO)

Direct Reports: None

Contractual Terms: Surrey Pay Scale S11. 36 hours per week / 52 weeks per year.

Job Context and Expectations of the Postholder

- This is a high profile post within an existing Multi Academy Trust
- The environment is sometimes pressurised so flexibility, a calm approach and a “can-do” attitude are required to carry out the role effectively
- The postholder’s integrity and discretion must be without question in order that MAT finances are managed to the highest standard
- Positive interactions with staff and students are an expectation
- Direct supervision is minimal so the ability to prioritise, use initiative, be proactive, organise one’s own workload and that of others, whilst maintaining high standards, is essential
- The postholder must be proactive in keeping professional knowledge up to date and have a commitment to personal and professional development
- It is crucial that all staff in the MAT adhere to and actively support MAT policies

Core Expectations

Staff should recognise that as the Trust grows and moves forward job roles will inevitably develop and change focus, and job descriptions will be reviewed accordingly. Staff need therefore to be flexible in their approach to accommodate the changing needs of the MAT and to participate fully in professional development which supports this.

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Key Accountabilities

1. Responsible for ensuring that the Trust's accounting systems are effectively and accurately maintained in compliance with the Funding Agreement, SORP, the Academies Financial Handbook, the Academies Accounts Direction and all relevant Companies and Charities legislation
 - Responsible for developing and monitoring the Trust's financial procedures and processes to support this aim
 - undertake the finance system administration tasks e.g. creating new periods, year end processes
 - undertake period end procedures for the two larger primaries in a timely and efficient manner
 - responsible for the financial management and reporting in the two small primaries and secondary school
 - undertake period end procedures for the MAT in a timely and efficient manner
 - interrogate and address issues in schools P&L and balance sheet
 - identify and perform all necessary accounting adjustments for all schools, and the MAT, as part of the period end process
 - prepare and submit consolidated HMRC returns, with the support of accountants as appropriate
 - reporting to the DFO on a monthly basis
2. Responsible for ensuring that financial data produced is fit for the purpose to support the Trust's financial reporting and strategic decision making
 - produce the financial monitoring for the larger two primary schools
 - monitor and report local financial information to support the consolidation for MAT financial reporting and strategic decision making
 - provide support for any capacity or capability issues identified in schools
 - cover the finance functions in schools when necessary

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3. Responsible for the production of information to support scrutiny, analysis, Audit, and Statutory Financial Statements
 - support the DFO to ensure that the schools financial policies, procedures and structures meet each school's needs and maintain compliance with Financial Standards
 - Quality assure financial processes and procedures and report to the DFO on a monthly basis
 - Ensure that all financial data recording has a clear audit trail and meets audit criteria to adequately evidence the content in the financial statements.
 - Responsible for the timely submission of all statutory returns

4. Responsible for the production of deliverable financial plans which support each school's curriculum and investment strategy,
 - Support the production of the annual budgets for the larger two primary schools
 - produce the annual budgets for the two small primary schools, secondary school and MAT.
 - ensure all income and expenditure is accounted for.
 - provide regular assurance to the DFO regarding annual budgets
 - proactively report budget variances and recommend key management actions
 - identify investment opportunities and make recommendations

5. Responsible for monitoring and reporting local financial information which supports the consolidation of the MAT financial reporting and strategic decision making
 - monitor monthly forecast outturns for the schools and MAT
 - proactively report budget variances and recommend key management actions
 - produce consolidated management reports on a monthly basis for the Trust

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6. Support the achievement of value for money across the MAT

- Ensure best value through
 - effective local purchasing, contract monitoring and benchmarking
 - support the DFO to deliver effective central purchasing and contract monitoring
- Support the DFO with the annual benchmarking exercise
- Contribute to the preparation of local bids and tenders for capital projects, grants and services

7. To keep professional knowledge up to date

- Attend briefings on financial matters and feed back to the DFO
- Undertake training as appropriate for professional development
- Be proactive in keeping abreast of DfE requirements, financial legislation and procedures
- Consult finance professionals for advice and information
- Contribute professional expertise to inform school finance policies and procedures

8. Other duties

- Attend some evening functions as requested by the DFO
- Undertake other tasks as reasonably requested by the DFO

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MAT FINANCE MANAGER – Person Specification

	Essential	Desirable	Evidenced by
Qualifications / Background	<ul style="list-style-type: none"> Recognised qualification in accounting e.g Part qualified CCAB Accountant or fully qualified AAT accounting technician or comparable financial experience Proven experience of financial management and reporting in a Multi Academy Trust and/or a secondary school academy 	<ul style="list-style-type: none"> Qualification in School Business Management e.g. CSBM DSBM or equivalent Experience of working in a leadership team and influencing at a strategic level Experience as a School Bursar or School Business Manager in a large school. Relevant work in a similar context. eg. education, social care, health etc. 	Application Certificates References
Leadership & Management	<ul style="list-style-type: none"> Business/delivery issues and the appropriate knowledge to handle and resolve complex issues, anticipate problems and recommend solutions within an overall strategic plan – preferably within the sector Experience of initiating, planning and delivering successful change Evidence of the ability to devolve responsibilities, delegate tasks and monitor outcomes Good organisation and proven administrative abilities 	<ul style="list-style-type: none"> Successful evidence of securing partnership working with an organisation outside normal partners Understanding of promoting positive relationships with the wider school community Experience of leading staff teams, including their professional development and performance management 	Application Interview References

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Knowledge & Experience	<ul style="list-style-type: none"> • Experience using PSF, or similar financial reporting software, across multiple units • Experience managing/tailoring financial procedures and policies • Knowledge and understanding of relevant legislation • 5 years' experience of managing large budgets • 5 years' experience of financial reporting, preferably at least 2 years in an Academy environment • Knowledge and understanding of consolidated Academy Financial reporting • At least 1 years' experience of supporting consolidated budgeting and reporting, preferably in an academy • Knowledge and understanding of how to interpret numerical/statistical data • awareness of the financial impact of decision making within schools • knowledge of methods to address existing sustainability issues within schools • Experience of one to one training/coaching • Understanding of promoting positive relationships with the wider school/MAT community 	<ul style="list-style-type: none"> • Knowledge of the commonly used EPS systems within schools/school funds and how the transactions recorded with these can be effectively included in MAT accounts • Experience of the academy conversion process • Knowledge of charities and Companies House legislation • Experience in marketing and revenue generation • Experience of leadership of a team of staff, ideally including those not directly supervised throughout the day • Understanding of IT based management information systems and Microsoft systems • Knowledge and understanding of procurement processes • Knowledge and understanding of property management 	Application Interview References
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Skills and Abilities	<ul style="list-style-type: none"> • Well-developed interpersonal skills, working with individuals and within a team • Able to negotiate, consult and make effective decisions • Excellent organisation planning and analytical skills • Able to demonstrate a high level of written and oral communication skills • Able to devolve responsibilities, delegate tasks and monitor outcomes • Effective time management and organisation 		Application Interview References
Personal Qualities	<ul style="list-style-type: none"> • A desire to make a difference to the lives of young people • Resilience, energy, enthusiasm, creativity, adaptability and flexibility • Able to work as part of a team • Able to work under pressure, meet deadlines and keep calm • Willingness to learn quickly • Honest and able to work with integrity 		Application Interview References
Safeguarding	<ul style="list-style-type: none"> • Ability to form and maintain appropriate relationships and boundaries with children and young people in line with the schools' Safeguarding and Child Protection policies. 		Interview References