



## Executive Summary and Contents

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**Role:** Trust Management Accountant

**Salary:** Scale H Point 28 – 33 – £42,060 – £46,968 p.a.  
(depending on qualifications and experience) inflation  
award pending.

**Hours:** 36 hours per week / 52 weeks per year (part time  
of at least 30 hours per week will also be considered)

**Start Date:** As soon as possible

Leading Strategic Growth and Operational Excellence



A merger of Auriga Academy Trust  
with Coombe Academy Trust to  
form Helix Learning Trust





## **A Message from the Board of Trustees**

Thank you for your interest in the position of Trust Management Accountant. This appointment comes at a vital time as we integrate our schools into a unified, resilient Trust.

The merger of Coombe Academy Trust and Auriga Academy Trust has been approved by the DfE (Awaiting approval). As part of the merge, the Trust is being renamed with the proposed name of Helix Learning Trust.

While the Helix name will be new, it represents the combined talent, energy, and vision of two successful Trusts with a decade-long track record of delivering high-quality education. We are immensely proud of our schools' reputations and the vital contribution they make to our local communities across Kingston, and Richmond.

The Board is seeking a technically skilled and proactive Management Accountant who can thrive during a period of significant integration and consolidation. This role offers the unique opportunity to provide the financial backbone for a Senior Leadership Team dedicated to developing a 'best-in-class' approach to inclusive education.

As a Board, we are committed to providing the strategic support and investment necessary to ensure our financial systems and reporting are as high-performing as our classrooms. We are looking for a professional who can translate complex data into actionable insights, ensuring the robust health of our central functions.

We look forward to meeting candidates who share our ambition for excellence and our commitment to financial transparency and operational resilience. We wish you every success in your application.



## A message from the CEO

The creation of Helix Learning Trust marks a transformative milestone as we merge the expertise of Auriga Academy Trust and Coombe Academy Trust across the boroughs of Kingston, and Richmond. We are building a unified organisation responsible for 3,800 pupils across eight schools, blending mainstream excellence with specialist SEND provision.

Our vision for Helix is to drive exceptional educational outcomes and provide sector-leading professional development, while pioneering greater SEND inclusion across all our schools. By integrating specialist expertise with mainstream excellence, we are directly answering the DfE's call for inclusive Trust growth. Helix is ideally positioned to lead the sector, turning the evolving social and financial challenges of modern education into opportunities for innovation.

To achieve this, we are seeking a Trust Management Accountant who will serve as a vital financial partner to the Executive Team and the Board. This is more than a standard accounting role; we are looking for a specialist to help navigate a comprehensive integration programme, harmonising financial practices and ensuring consistency across our newly unified Trust.

This is a pivotal appointment for Helix Learning Trust, requiring a finance professional who will act as a key driver of our financial clarity throughout this transformative period. Beyond day-to-day reporting, the successful candidate will be an architect of our financial future, leading the intricate work of consolidating budgets, aligning systems, and optimising our combined resources. We are seeking a proactive accountant with proven experience in financial modeling and systems integration—someone capable of managing the complexities of a live merger to create the fiscal stability necessary for our schools to thrive. This role demands a sharp analytical perspective to ensure that as we grow, our central financial functions are not just consolidated, but are fundamentally designed to be resilient, transparent, and best-in-class.

We hope this insight into Helix Learning Trust inspires you to join us. I look forward to discussing the role with you further and exploring the vital contribution you can make to our team.

*Esther*

Esther Brooks





## Our Vision and Mission

Our mission is to combine mainstream excellence with specialist SEND expertise to drive exceptional outcomes for all 3,800 pupils across our schools. We aim to lead the sector in inclusive education, turning the financial and professional challenges of modern schooling into opportunities for innovation.

## The Helix\* Portfolio

We will operate a diverse family of **8 schools** across Kingston, and Richmond supported by a **£34m** annual budget.

- **2 Mainstream Secondary Schools** and a combined **Sixth Form**.
- **3 Mainstream Nursery and Primary Schools**.
- **3 SEND Specialist Schools** (providing both Primary and Secondary provision) over 9 sites.
- **5 Specialist Resource Provisions (SRPs)** integrated within our mainstream settings from Nursery to Key Stage 4.

**Our Co-Location Model:** While our SEND schools are co-located with mainstream hosts to foster inclusion, they maintain entirely separate leadership, management, and specialist facilities.



## The Role: Purpose

The role will work closely with the Director of Finance and other members of the finance team to provide financial, budgetary and forecasting information to headteachers and trustees.

Main duties include:

- Assisting with the annual and three-year budget setting process for all schools within the Trust.
- Acting as finance business partner for 2 secondary schools
- Preparing monthly management reports, forecasts and variance analyses for the secondary schools and MAT central budget.
- Overseeing the monthly budget monitoring process and forecasting for all schools
- Assisting in the development and maintenance of financial and budgeting systems
- Undertaking regular salary reconciliations to the submitted budget
- Accounting for capital grants and related expenditure
- Maintaining the Trust's fixed asset register
- Assisting with financial reporting and financial returns
- Acting as a key point of financial expertise within the finance team and to non-financial members of staff

Our ideal candidate will have excellent communication skills, be a part-qualified CCAB accountant or fully qualified accounting technician (AAT) with at least 5 years of accounting experience.

You will be able to demonstrate strong technical and analytical skills, a commitment to continuous improvement, and advanced excel skills. You will take a methodical but flexible approach to your work, delivering a high degree of accuracy and attention to detail, but with the ability to keep sight of the broader picture.



## Job Description

To support the Director of Finance in providing timely and professional management and forecasting information to Headteachers and Trustees. To work collaboratively and flexibly with finance colleagues and the senior leadership team to meet the ethos, aims and values of the Trust whilst ensuring value for money and the long-term sustainability of the Trust is achieved.

**RESPONSIBLE TO: Director of Finance**

### KEY DUTIES AND RESPONSIBILITIES

#### Financial Planning, monitoring and operations

1. Assist the Director of Finance with the annual and three- year budget setting process for all schools within the Trust.
2. Act as finance business partner for two secondary schools.
3. Prepare monthly budget variation reports with variance analysis for head teachers. Investigate major variances, advise of their impact, and make recommendations accordingly.
4. Produce summarised monthly budget variation reports for Trustees and governor meetings including forecast, variance analysis and commentaries.
5. Produce forecasts for attached schools at least 3 times per year.
6. Lead on the collection and analysis of benchmarking data and calculation of key metrics. Report and advise SLT accordingly.
7. Prepare costings and investment appraisal reports as required.
8. Undertake regular salary reconciliations to submitted budget.
9. Monitor the consistency of income and expenditure classification across all schools and issue guidance to finance team where discrepancies arise.
10. To assist in the development and maintenance of financial and budgeting systems.



## Job Description

### Fixed Asset accounting

11. Ensure the Trust appropriately monitors and accounts for capital grants including the School Condition Allocation.

12. Responsible for the recording and accounting for assets in accordance with the asset register procedure and fixed asset policy. In particular:

- Ensure relevant assets are added to the register at time of purchase
- Review revenue accounts for mis-posted capital expenditure
- Prepare depreciation calculations for posting line with the fixed asset policy
- Carry out at least an annual asset verification exercise to compare physical assets to those on the register.

13. Oversee the maintenance of school inventories.

### Financial Returns

14. Provide support and cover where necessary to the Financial Accountant in the preparation and submission of the Trust VAT return.

15. Provide support and cover where necessary to the Financial Accountant in the preparation and submission of the bi-annual payment practices report.

16. Prepare working papers as required to support the Trust Financial Statements and Trustee report.

17. Assist and support the Director of Finance in the preparation and submission of all ESFA submissions. This currently includes Budget Forecast Return (BFR), Budget Forecast Outturn (BFRO) and Annual Accounts Return (AAR).

### Other

18. Provide training and support to finance team officers to ensure the delivery of a high-quality finance service.

19. Provide training and support to budget holders in using the finance portal.

20. Keep abreast of changes in financial regulations, legislation and academy financial framework.

21. Any other duties commensurate with the grade that the Director of Finance may reasonably require.



## Person Specification

Qualifications	Essential	Desirable
GSCE Mathematics and English grade C or above	✓	
Part qualified CCAB Accountant or fully qualified AAT accounting technician	✓	
CCAB fully qualified Accountant		✓
Experience		
5 years accounting experience , to include		
Annual Budget setting and monitoring	✓	
Management accounts production	✓	
Statutory accounts and production of Financial Statements		✓
Payroll and pensions		✓
Accounting experience gained working in a charity or education sector		✓
Proven leadership and management qualities at a senior level	✓	
Use to a high level of core financial systems, in particular general ledger and report writing tools	✓	
Experience of leading and managing staff effectively		✓
Reconciliations	✓	
Experience of managing change effectively and implementing new systems/procedures/controls	✓	



## Person Specification Continued

Knowledge, Skills and Abilities		
High level communication skills- -ability to use a range of communication styles and techniques appropriate for the target audience and purpose. -ability to influence and challenge senior leadership	✓	
Strong analytical skills and attention to detail	✓	
Ability to offer comprehensive and innovative solutions	✓	
Work as part of a team and on own initiative	✓	
Take a flexible approach and ability to work under pressure	✓	
Prioritise, plan and programme workloads to meet specified deadlines	✓	
Ability to exercise sound and balanced judgement over financial decisions	✓	
Be responsive and adaptable to new or changing situations	✓	
Ability to interpret complex legislation or regulations	✓	
Excellent Excel skills –(to include data manipulation, creating and maintaining pivot tables, commonly used functions, particularly lookups , logical expressions and mathematical expressions) ability to present information in a clear succinct format	✓	
Good Word skills – ability to produce clear, comprehensive, well formatted reports	✓	
Knowledge and understanding of financial framework governing academies		✓
Knowledge of company and charity legislation, regulations and reporting requirements		✓
Knowledge of Taxation (PAYE/VAT)		✓
Knowledge of Pensions		✓

## Appointment Process and How to Apply

Candidates should complete the application process on My Term New.

We welcome applicants to speak with the Director of Finance prior to submitting your application. To arrange a telephone call please email:  
dcastal@coombe.org.uk@coombe.org.uk

**Closing date:** 15th May 2026

If sufficient applications are received, Interviews may be held before the closing date.



The Coombe Academy Trust is a company limited by guarantee (company number 7905433, registered in England and Wales) that has its registered office at:

Coombe Boys' School  
Blakes Lane, New Malden, Surrey, KT3 6NU.

Trust related enquiries:  
[trustenquiries@coombe.org.uk](mailto:trustenquiries@coombe.org.uk)

