



WILLOW TREE Academy



TRUST FINANCE MANAGER RECRUITMENT PACK

The Trust Finance Manager is a new role designed to support the CEO and the COO/CFO in the management of financial operations within the Trust and member schools.

You will work collaboratively with business managers and others in schools to set standards, develop knowledge and understanding of finance policies and procedures, and to provide specialist expert advice and support.

The role requires a dedicated, flexible and organized person who will approach work with a positive attitude, and integrity. The successful candidate will be required to work within our values, ethos and approach of secure autonomy.

The position will be based at Herringthorpe Junior school and the successful candidate will be expected to travel to member schools.

Willow Tree Academy is committed to safeguarding and promoting the welfare of children and expects all staff and volunteers to share this commitment. We will carry out pre- appointment checks including DBS and will disqualify any applicant where we consider the outcomes to be unsatisfactory. This post is exempt from the Rehabilitation of Offenders Act (ROA) 1974.

We are equally committed to ensuring that no applicant will be disadvantaged or discriminated against because of their protected characteristics under the Equality Act 2010.

A MESSAGE FROM OUR CEO

Willow Tree Academy Trust is a diverse and interdependent, successful family of schools, founded on effective collaboration and committed to pursuing excellence through continuous improvement. Whether you are a member of the finance team, the operations team, the teacher training and development team or the executive team, as a central team member our role is to provide comprehensive support and appropriate challenge to member schools and to work together to ensure the very best outcomes for children and young people. Our expectation is that you are committed to our Willow Tree values, ethos and approach and that you place children and young people at the heart of all decision-making.

If you are someone who enjoys challenge and is ready to play a vital part in the team who will create a successful future for all of the pupils in Willow Academy Trust, we would welcome your application for the post.

ABOUT WILLOW TREE ACADEMY

Our multi-academy trust was founded in 2015 and developed from collaboration between schools, the significant positive impact of which convinced four schools that together we would have much greater capacity to continuously improve. Over time, Willow Tree Academy has steadily grown. We began as a single junior school and as we have grown, three other primary schools have joined us. There are currently four member schools, three primary schools and one junior school.

As a successful family of schools, delivering high-quality education for the communities we serve, Willow Tree Academy values its diversity. Each school brings their own distinct character, community, history and identity. We celebrate the uniqueness of member schools, recognising that there is a great deal to learn from education in different contexts. This is also the reason why we remain outward-looking, committed to learning from research

and excellent practice across the education system.

OUR VISION AND VALUES

Willow Tree Academy Trust holds children and young people at the heart of all that we do. We recognise that as a multi-academy trust we exist in order to advance education for the public good. Our mission, therefore, is to improve life opportunities for children and young people by both providing the best possible education and care to pupils in Willow Tree member schools and by having a positive impact across the wider education system. Our values are encapsulated in four words:

Headteachers, with school leadership teams and staff, have autonomy to lead school improvement in their own schools, responsively and in collaboration with others within and beyond our trust. We believe that this consistent and collaborative approach enables us to grow, attract and retain excellent school leaders and to develop the most innovative and impactful school improvement strategies. We recognise that this autonomy must be secured within the structure of the multi-academy trust, and our model of challenge and support for impact, underpinned by our shared values, ensures sustained school improvement and a sharp focus on outcomes for pupils. This in turn realises our ambition that at *Willow Tree* member schools *'Together Anything is Possible'*



WILLOW TREE
Academy



Job Description **Trust Finance Manager**

Name:

Post Title: TRUST FINANCE MANAGER

Grade/Salary: Band K 36-39 (£47,181-£50,269)

Hours: 37 hours Permanent 52 weeks-negotiable (26 days + 8 bank holidays)

Responsible to: Head of Finance

Responsible for: Finance

Core Purpose

In line with the values, ethos and strategic direction of Willow Tree Academy Trust as determined by the CEO and Board of Directors and under the overall direction of the CFO, the Trust Finance Manager will;

- Support the Head of Finance in the management of financial operations within the Trust and member schools.
- To work with school business managers and others in schools to set standards and develop knowledge and understanding of finance policies and procedures across Willow Tree Academy Trust and member schools, and to provide specialist and expert advice and support across Willow Tree Academy Trust.
- Working collaboratively with school leadership teams and central team to ensure that the welfare and educational outcomes of pupils are at the centre of all strategic planning.
- Support the executive team, school leadership teams and central team in maintaining an inclusive culture which values Willow Tree employees as the Trust's most significant resource and promotes staff well-being.
- Role model integrity and commitment to the vision, values and ethos of Willow Tree Academy Trust.

Legal Requirements

The Trust Finance Manager's professional duties must be carried out in accordance with the following:

- The Willow Tree Academy Trust scheme of delegation
- The provisions of all applicable legislation
- The Funding Agreements of the Schools within the Trust and the Academies Financial Handbook
- Willow Tree Academy Trust's internal financial controls and procedures

Main Duties and Responsibilities:

- To understand the finance policies and procedures across Willow Tree Academy Trust and member schools, and to provide specialist and expert advice and support across Willow Tree Academy Trust as necessary.
- Support with the development of systems and procedures to ensure the efficient, effective and accurate management of Trust finance.
- To assist the Trust's CFO with the Trust's compliance with the Academies Handbook.
- To assist the CFO/COO with the collation of information for audit or other external returns.
- Management of the Teachers Pensions Audit process liaising directly with external auditors and the payroll provider.
- Responsibility for setting the 3-year budget forecast for the Central Team.
- Upload the annual budgets for all schools to the finance system in preparation for each new academic/financial year.
- Use the agreed budget to actively monitor and control performance to achieve Best Value.
- Provide monthly budget monitoring reports to the Chair of the Trust and the CEO for the Central Team budget, other central team budget holders and other stakeholders as applicable.
- Update the in-year forecasts to provide effective information to the Head of Finance for the management accounts and to allow informed decision making on Trust operations.
- Undertake the month end reconciliations and other checks, as prescribed by the CFO, for the Central Trust.
- Compile and process internal recharge journals.
- Work collaboratively with the central team and school finance teams to ensure the effective support of member schools, from time to time performing such other duties as may be required including part-time secondment to undertake finance functions as necessary.
- Deal with queries, as appropriate, supporting the Central Finance Team to ensure a positive image of the Trust is always presented.

Leadership and Management

- Lead and manage direct reports in order to inspire, raise aspirations, improve achievement, embed ambition and continually drive improvement in order to achieve the vision and aims of the Trust.
- Contribute to the Trust's culture and development by ensuring that staff are fulfilling their professional responsibilities in relation to financial matters and are carrying out their duties effectively.
- Share good financial practice across the Trust and academies.
- Assist the CFO to ensure an appropriate induction programme is in place for new staff in finance and provide excellent support for those members of staff who are new to the Trust/Academy environment.

Other

- Be aware of, and comply with, policies and procedures relating to safeguarding, child protection, health and safety, confidentiality and data protection, recording/ reporting all concerns to the appropriate person and disclosures to the relevant professional.
- Be aware of and support difference and ensure all pupils have equal access to opportunities to learn and develop;
- Contribute to the overall vision and values of Willow Tree Academy Trust;
- Attend and participate in meetings, training and learning activities as required;
- Other duties agreed from time to time.

The duties above are neither exclusive nor exhaustive and the post holder may be required by the Chief Executive Officer or Chief Finance Officer to carry out appropriate duties within the context of the job, skills

and grade.

It is the practice of Willow Tree Academy Trust to periodically review job descriptions to ensure that they relate to the job performed and to incorporate any changes. In these circumstances, Willow Tree Academy Trust will seek to reach agreement on reasonable changes but, where agreement is not reached, Willow Tree Academy Trust reserves the right to make changes to the job description, following consultation.

Willow Tree Academy Trust is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share in this commitment. As this post meets the requirements in respect of exempted questions under the Rehabilitation of Offenders Act 1974, all applicants who are offered employment will be subject to an Enhanced Disclosure and Barring Service Check (DBS) before the appointment is confirmed. This will include details of ALL cautions, reprimands or final warnings as well as convictions, whether "spent" or "unspent". Criminal convictions will only be taken into account when they are relevant to the post



Person Specification - TRUST FINANCE MANAGER

No	Categories	Essential	Desirable
QUALIFICATIONS			
1.	Educated to a good level of education	X	
2.	GCSE in English and Maths (Grade 4 or above)	X	
3.	Recognised financial qualification (CIPFA/ACCA/ACA/CIMA/AAT) – demonstration of relevant equivalent experience may be considered)	X	
4.	School financial or business management qualification		X
5.	Evidence of commitment to continuing professional and personal development in financial management	X	
EXPERIENCE, ABILITIES, SKILLS & KNOWLEDGE			
6.	Minimum of 2 years' experience in a senior finance role	X	
7.	Experience of working within a finance role in an educational environment		X
8.	Experience of using a range of financial and other ICT packages	X	
9.	Good knowledge of the financial workings of a school/Trust		X
10.	Excellent attention to detail	X	
11.	Good working knowledge of excel	X	
12.	Experience of using SAGE Intacct		X
13.	Experience of delivering training		X
14.	Experience of developing and supporting the implementation of financial policies and practice	X	
15.	Experience of setting and monitoring multi-year budgets	X	
16.	Experience of working directly with external auditors	X	
17.	Experience line managing finance staff	X	
18.	Practical knowledge of VAT regulations		X
PERSONAL QUALITIES			
19.	Committed to actively promoting the values of Willow Tree Academy Trust	X	
20.	Ability to identify work priorities and work in an organised and methodical manner	X	
21.	Ability to communicate with a range of audiences including other employees within the Trust, Academy, governors, pupils and parents	X	
22.	Responds positively to pressure whilst maintaining accessibility and consistency	X	
23.	Dedicated team worker with the ability to work flexibly to meet the changing requirements of the trust and member schools	X	
24.	Ability to show sensitivity and objectivity in dealing with confidential issues	X	
25.	Diplomatic and resourceful with developed advocacy facilitation and negotiation skills	X	

26.	Well-developed interpersonal skills and communication skills	X	
27.	Willingness to participate in further training and developmental opportunities offered by the Academy and Trust, to further knowledge	X	
28.	Commitment to safeguarding and equality	X	