



JOB DESCRIPTION

JOB TITLE: CIMA Graduate Apprentice (Finance)
GRADE: Grade F (9-13)
RESPONSIBLE TO: Head of Finance
JOB PURPOSE: The CIMA Graduate Apprentice will be a key member of the central finance team, supporting both the operational delivery and strategic development of financial services across the Trust.

This is a developmental role that provides a structured pathway towards a professional accounting qualification (CIMA). The postholder will gain experience across financial accounting, management accounting and school finance, building the skills required to progress into a qualified finance role.

The apprentice will work closely with school leaders, budget managers and the wider finance team to ensure strong financial control, high-quality financial reporting and planning, in compliance with Trust policies and the Academy Trust Handbook.

| ACCOUNTABILITIES / MAIN RESPONSIBILITIES | |
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| Operational Issues | <p>1. Financial Accounting (Transactional & Operational Support)</p> <ul style="list-style-type: none"> • Provide high-quality day-to-day financial support across the Trust, including: • Raising and processing purchase orders in line with Trust procedures • Processing supplier invoices and supporting timely and accurate payments • Raising sales invoices and supporting income collection processes • Supporting and performing bank, supplier, customer and control account reconciliations • Assisting with cash handling and banking processes • Supporting payroll-related reconciliations and queries • Maintaining accurate and up-to-date financial records within Trust systems • Assisting with month-end processes, including accruals and prepayments • Supporting the preparation of audit-ready documentation and maintaining clear audit trails • This work will provide a strong foundation in core finance processes. |

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| | <p>2. Management Accounting (Developmental Exposure)</p> <ul style="list-style-type: none"> • Support the preparation of monthly management accounts, including variance analysis and forecast preparation/validation • Assist with budget monitoring and reforecasting across schools • Contribute to KPI tracking and financial benchmarking • Support the annual budget setting and longer-term financial planning process • Assist in preparing financial reports for Headteachers, Senior Leaders and Governors and respond to related questions • Support the use of Integrated Curriculum and Financial Planning (ICFP) to align staffing, curriculum delivery and financial sustainability • Develop an understanding of how financial planning supports school improvement and resource allocation • Assist with external audit processes and internal audit reviews, including preparing working papers, gathering evidence and responding to audit queries <p>3. School & Stakeholder Support</p> <ul style="list-style-type: none"> • Work in partnership with schools to support day-to-day financial processes • Provide guidance and support to school-based staff (under supervision) • Build effective working relationships with Headteachers, School Business Managers and administrative teams • Support the delivery of financial training where appropriate <p>4. Systems & Process Improvement</p> <ul style="list-style-type: none"> • Support the effective use of Trust finance systems (e.g. accounting, procurement and budgeting systems) • Assist in improving financial processes to drive efficiency and consistency • Support data accuracy and alignment across systems <p>5. Compliance & Governance</p> <ul style="list-style-type: none"> • Work in line with the Trust’s Scheme of Financial Delegation • Support compliance with financial policies and procedures • Maintain awareness of regulatory and funding requirements • Contribute to a strong internal control environment <p>6. Professional Development (CIMA Apprenticeship)</p> <ul style="list-style-type: none"> • Commitment to the successful attainment of a full Chartered Institute of Management Accountants (CIMA) qualification, building professional expertise and supporting the Trust’s long-term finance capacity and succession planning • Actively engage in the CIMA qualification programme, including study and assessments • Apply learning from professional studies in the workplace |
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| | <ul style="list-style-type: none"> • Maintain a commitment to continuous professional development <p>General Responsibilities</p> <ul style="list-style-type: none"> • Work collaboratively as part of a high-performing central finance team • Support the Head of Finance and wider team as required • Maintain high standards of accuracy, professionalism and organisation • Undertake other duties appropriate to the role |
| Safeguarding and Promoting the Welfare of Children/Young People | <ul style="list-style-type: none"> • Be responsible for promoting and safeguarding the welfare of pupils in line with policy and legislation, raising concerns as appropriate • The Yorkshire Learning Trust (YLT) is committed to safeguarding and promoting the welfare of our pupils and young people. We have a robust Child Protection Policy and all staff will receive training relevant to their role at induction and throughout employment at the school. We expect all staff and volunteers to share this commitment. This post is subject to a satisfactory enhanced Disclosure and Barring Service criminal records check for work with children. |
| Health & Safety | <ul style="list-style-type: none"> • Be aware of and implement your health and safety responsibilities as an employee and where appropriate any additional specialist or managerial health and safety responsibilities as defined in the Health and Safety policy and procedure. • To work with colleagues and others to maintain health, safety and welfare within the working environment. |
| Data Protection | <ul style="list-style-type: none"> • Know about data protection issues in the context of your role. • To comply with the YLT's policies and supporting documentation in relation to Information Governance this includes Data Protection, Information Security and Confidentiality |
| Equalities | <ul style="list-style-type: none"> • Within own area of responsibility work in accordance with the aims of the Equality policy, treating people with respect for their diversity, culture and values • The YLT is committed to equality and to making fair and equitable treatment an integral part of everything we do. The Trust is committed to safeguarding and promoting the welfare of children and expects all staff to share this commitment. The post is subject to a successful DBS check and pre-employment checks will be undertaken before an appointment is confirmed. |
| Customer Service | <ul style="list-style-type: none"> • The YLT requires a commitment to equity of access and outcomes, this will include due regard to equality, diversity, |

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| | <p>dignity, respect and human rights and working with others to keep vulnerable people safe from abuse and mistreatment</p> <ul style="list-style-type: none"> • The YLT requires that staff offer the best level of service to their stakeholders and behave in a way that gives them confidence. Stakeholders will be treated as individuals, with respect for their diversity, culture and values |
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This job description is not your contract of employment, or any part of it. It has been prepared only for the purpose of school organisation and may change either as your contract changes or as the organisation of the school is changed. Whilst this job outline provides a summary of the post, it is not a comprehensive list or description and the job will evolve to meet changing circumstances. Such changes would be commensurate with the grading and conditions of service of the post and would be subject to discussion and consultation. All staff are required to comply with the school's policies, procedures and ethos.

Elements of the Job Description may be re-negotiated at the request of either party and with the agreement of both. The post holder may, in addition, be asked to carry out other reasonable duties within the MAT, (which could involve working at other schools), as may be required for the benefit of the school and the students' education and well-being.

In relation to Data Protection, Information Security and Confidentiality, all staff are required to comply with the school's policies and supporting documentation in respect of these issues.

PERSON SPECIFICATION FOR
CIMA Graduate Apprentice (Finance)

| Essential upon appointment | Desirable on appointment |
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| Experience & Knowledge | |
| <ul style="list-style-type: none"> • Basic understanding of accounting principles | <ul style="list-style-type: none"> • Experience of working in a finance or administrative environment • Awareness of financial systems and processes |
| Qualifications | |
| <ul style="list-style-type: none"> • Degree in Finance, Accounting, Business or a related field | |
| Occupational Skills | |
| <ul style="list-style-type: none"> • Strong numerical and analytical skills • High attention to detail and accuracy • Excellent organisational and prioritisation skills • Ability to communicate effectively and confidently with non-finance colleagues at all levels of the organisation • Ability to work independently and as part of a team • Willingness to learn and develop professionally • Hold a full driving licence and be able to travel between Trust sites as required. | |
| Personal Qualities | |
| <ul style="list-style-type: none"> • Values-led and aligned to the Trust's ethos • Proactive and positive approach • Professional, reliable and trustworthy • Flexible and adaptable • Committed to delivering excellence in every journey | |
| Other Requirements | |
| <ul style="list-style-type: none"> • Enhanced DBS Clearance • To be committed to Continuing Professional Development • Motivation to work with children and young people • Ability to form and maintain appropriate relationships and personal boundaries with children and young people • Emotional resilience in working with challenging behaviours and attitudes • Ability to use authority and maintain discipline • An empathy for equality & diversity | |