



INFORMATION PACK

Assistant Finance Manager

Thank you for your interest in The Swan School, part of the River Learning Trust.

The Swan became Oxford's first completely new secondary school for over 50 years when it opened in September 2019.

When full, we will have approximately 1,140 students on roll, of whom around 240 will be in the Sixth Form. Our students are drawn from a local catchment area and the school will be at the heart of the community.

Learning from the most successful approaches at the best schools, The Swan School provides a uniquely challenging and structured experience in a caring and disciplined environment.

The ethos is academic; we regard an excellent academic education as the entitlement of all young people, no matter what their background or previous experiences of learning. Our students are inspired and nurtured, acquiring the knowledge and skills to think critically and creatively.

They learn to be confident, resilient



and ambitious, and have high expectations in terms of their own achievements and their contribution to wider society.

To achieve these aims we draw on best practices proven elsewhere, including a longer school day on Tuesdays that enables enrichment activities to be embedded in the curriculum.

Students read and are read to and we expect all students to work to the best of their abilities and have excellent attendance and behaviour. If you have any questions or would like to speak to someone about this post, please contact our school office via office@theswanschool.org.uk or on 01865 416 070.

We very much look forward to hearing from you.

Kay Wood, Headteacher.



A Unique Curriculum - Ambitious and Inclusive

The curriculum at The Swan School is tailored to provide a rigorous academic education. We have the highest expectations of what students can learn and encourage them to learn quickly and securely, while being considerate of different starting points. We know that giving all young people access to knowledge through which they can be successful promotes social justice and ensures students have a full range of opportunities open to them.

The subjects taught are broadly traditional, but all students are motivated to stretch themselves beyond what is normally expected in English, mathematics, sciences, a modern foreign language, history, geography and religious education. Alongside this, and seen as of equal value, is their learning in art, design and technology, and music, in which they are taught to both appreciate the achievements of others and to develop their own creative abilities. In all subjects, the emphasis is on expertly-designed learning with high levels of structure.

There is absolute clarity for all on what students are expected to know and do at each point. No time is spent on tasks that don't move students on. This is also evident in the provision of home learning – some of which is completed during tutor time, and some at home.

This is purposeful, clear and useful, normally involving practice or learning of key vocabulary in all subjects.



Electives

Our longer day on a Tuesday also means time for 'electives' every week. Electives are timetabled slots in which students choose from a range of enriching activities alongside the main curriculum. Currently these include specialised sport, music, drama, additional languages and volunteering.

Electives are a chance for students to explore existing passions and discover new ones.

They are a compulsory part of school life so that enrichment is an entitlement for all, not an optional extra for a few.

Everyone at The Swan School works hard, guided by the belief that, through effort and dedication, wonderful things can happen.

Students are expected to show commitment, self-discipline and responsibility in their studies.

As a result, they produce work of the highest quality and learn to achieve more than they ever believed possible.

Co-curricular Activities

Students at The Swan School are able to access a wide range of activities outside the curriculum, helping them to develop confidence, curiosity and resilience, and ensure their development into well-rounded young people.

Students will be active participants in the school, local community and beyond. They learn consideration and kindness, and contribute to society. Swan students have 40 minutes of tutor time every day where we focus on their personal and social development.

Tutors and co-tutors guide their tutees through a centrally planned 'pastoral curriculum' that includes PHSE topics, values-based activities, and opportunities to debate topical issues in 'Thought for the Week'.

Tutor time also includes 'guided reading' where tutors read to their tutees for 20 minutes to help develop their literacy, love of reading, and cultural capital.

Support and Inclusivity

The Swan School is an inclusive school, where all students learn well, no matter what their previous experiences of learning, background or circumstances.

Our experience in schools confirms that all young people can learn challenging content. Therefore, our approach to teaching students with SEND or other barriers to learning is to ensure that classroom delivery and organisation is of the highest standard, and to intervene immediately when evidence shows that a student is falling behind.

If a student demonstrates lower than expected levels of literacy or numeracy in the early years, intensive teaching will be provided to ensure that this is, where possible, remedied. An outstanding learning support team and the extra-flexibility provided by the extended day allow us to make sure that no student falls behind or does not make good progress. Good schools do not give up on students.

Family Dining

Students and staff sit and eat together every day to promote healthy eating, caring for others, maturity and conversation skills. This communal approach helps all our students to learn good habits, consideration for others, and also how to engage in discussions with confidence. Breakfast and healthy snacks at break are also available.



RIVER LEARNING TRUST

The Swan School is part of River Learning Trust (RLT), a multi-academy trust responsible for primary and secondary schools and a school-centred initial teacher training provider across Oxfordshire, Berkshire and Wiltshire.

OUR VISION

Education has the power to change lives, communities and society for the better.

At the River Learning Trust we believe that we can achieve more for our pupils, trainees, staff and communities by working together rather than alone.

All of the schools in the River Learning Trust are united by a common belief in the benefits of working together, and by our commitment to our shared principles. Our vision is for our schools and SCITT to improve rapidly, continuously and sustainably: to be better faster together.

Our 'Why?' is that children and young people 'only get one go' in school and our schools should improve faster and be better as part of RLT to ensure the best possible 'go' for our pupils.

Our 'How' is through the highest possible support and challenge for our schools and each other, underpinned by our three principles. We use the principles of 'aligned autonomy' to empower colleagues in schools to perform well; we rarely direct from the centre but rather support leaders and other colleagues to do their work exceptionally well in their own context.

The schools and SCITT are united by their commitment to the principles of the trust and a common belief in the benefits of everything that is gained by working together.

WHAT MATTERS TO US

The River Learning Trust is a community of children, young people and adults with shared principles.

These principles are:

- Commitment to Excellence; striving for the best educational experience through continuous improvement.
- Everyone Learning; creating and taking opportunities that enhance lives through evidence-based practice supporting adult and pupil learning.
- Respectful Relationships; acting with care, integrity, and fairness in all we do.

THE POWER OF PEOPLE

High-performing organisations have the right organisational culture, effective processes and well-trained, motivated colleagues in the right roles.

We focus a great deal on people and the importance of continuous professional learning and development.

THE TRUST'S SCHOOLS

We currently educate around 14,500 pupils and have around 2,000 colleagues working in the trust. The SCITT trains around 110 trainees across some 40 schools in Oxfordshire, Berkshire and Wiltshire.

SECONDARY SCHOOLS

Cheney School
Chipping Norton School
Gillotts Secondary School
Gosford Hill School
Kingsdown School
The Cherwell School
The Marlborough CofE School
The Oxford Academy
The Swan School
Wheatley Park School

Horspath CofE Primary School
Larkrise Primary School
Madley Brook Primary School
Middle Barton Primary School
New Marston Primary School
Rose Hill Primary School
Sandhills Primary School
Seven Fields Primary School
Tower Hill Primary School
Witney Community Primary School
Windrush CofE Primary School
Wolvercote Primary School

PRIMARY SCHOOLS

Barton Park Primary School
Bayards Hill Primary School
Beckley CofE Primary School
Charlbury Primary School
Cuttleslowe Primary School
Edith Moorhouse Primary School
Edwards Field Primary School
Garsington CofE Primary School

SCITT

OTT

TEACHER SCHOOL HUB

Oxfordshire Teaching School Hub



JOB DESCRIPTION

Title of Post:

Assistant Finance Manager

Contract Terms: Permanent

Grade: Grade 11

Hours: 29.6 per week (0.8FTE) term time only plus 3 weeks (total 41.5 weeks)

Accountable to: School Business Manager

PURPOSE OF THE POST

To support the school's School Business Manager (SBM), and the Headteacher in the day-to-day operation of the Finance functions within the school. Maintaining the schools' financial systems and ensuring effective procedures are followed through compliance with all relevant regulations and guidance, and the adoption of best practice.

Role Summary:

Strategic financial planning & budgetary control

- Work with the SBM to establish expenditure priorities and use of resources to ensure value for money.
- Assist the SBM in the preparation of the school's annual budget and in year re-forecasts.

Reporting & Monitoring

- Prepare the working papers for the schools management accounts to support the SBM in the preparation of the accompanying report.
- Support SBM with monitoring performance against budget at reporting periods.
- Investigating monthly variances from spend to budget.
- Provide budget holders with regular updates of their accounts and advise them on matters relating to their budgets.
- Reviewing the utilisation of specific funding such as Pupil Premium and SEN Funding.
- Reviewing and Monitoring of Catering income against expenditure.
- Review of School Condition Allocations and capital expenditure in line with budgets set.
- Look to identify opportunities for efficiencies and maximising income opportunities where possible.
- Review bad debt provision and report to SBM on a monthly basis.

Day to day & month end finance processes

- Working with the SBM, manage all Finance office processes ensuring they are carried out efficiently, effectively and according to the RLT financial regulations by the Finance team. This will include oversight of but is not limited to:
 - Accounts Payable – ordering, invoices, payments, statement reconciliations
 - Cashless payment system.
 - Setting up monthly Direct Debit instructions for payment of school catering.
 - Bank reconciliations.
 - Sales Ledger including the invoicing of the schools SLA's.
 - Bursary Payments.
 - Expenses transactions from prepaid cards.
 - Trip control accounts and accounting adjustments.
 - Post all adjusting journals as required including the Recharge Journals.
 - Filing information which will be required at the audit.
 - Credit card management.
 - Communicate with parents (e.g. setting up Direct Debit instructions, missed payments, financial support).
 - Communicate effectively with the school community so all are aware of what is expected of them to meet the regulations and ensure the above processes run smoothly.
- Ensure the "Finance" email address is monitored daily and provide cover for Finance Officer and Finance Assistant when required.
- Working closely with the SBM and HR Manager ensure the monthly payroll is run smoothly and accurately:
 - Reviewing payroll claims and reports to ensure reports are accurate and amendments are properly authorised and evidenced;
 - Ensure correct entry of payroll journal into school accounts;
 - Analyse variances between actual and budget payroll staffing;
 - Notify the Finance Manager and SBM of any changes to forecasts as they arise;
 - Ensure monthly payroll is reconciled with the budget.

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Grade: Grade 11

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Accountable to: School Business Manager

Day to day & month end finance processes Cont.

- Ensure that month end procedures are carried out in accordance with the Trust month end checklist including but not limited to:
 - Bank and credit card reconciliations
 - Parent Pay reconciliations
 - Reconciliation of sales and purchase ledgers and review of aged debtors and creditors
 - Where appropriate, ensure debt is chased promptly
 - Review outstanding purchase orders and unpaid invoices
 - Preparing accruals, prepayments, accrued and deferred income
 - Ensure all balance sheet reconciliations are up-to-date and any queries are resolved
 - Review and analysis of other income, including lettings, uniform sales, offsite educational visits, etc. to ensure that income is properly and completely recorded and any excess of income over expenditure or vice versa is determined and reported to the SBM.

Compliance

- Maintaining and continuously improving school systems and procedures to ensure that financial transactions are recorded and reported completely and accurately, with effective internal controls.
- Working with the SBM, ensure that the trust finance policies are adhered to across the school and that financial processes comply with the trust scheme of delegation.
- Ensure financial procedures are fully documented to withstand external scrutiny from internal & external auditors.
- Keep up to date with changes to funding streams

Line management

- Supervision of the Finance Officer (and any other staff in similar roles) contributing to half yearly appraisals and setting their objectives

General Duties

- Support SBM on any other finance related tasks.
- Assist with annual audit providing any requested evidence to external auditors within the given timeframes.
- Provide cover in the finance team as required.
- Suggest process improvements where appropriate.

Other duties and accountabilities

- Maintaining an awareness of legislation and guidance from funding bodies on finance, tax, VAT, NI and other relevant matters.
- Being aware of and complying with policies and procedures relating to child protection, Health & Safety and security, confidentiality and data protection, reporting all concerns to the Finance Director.
- Ensuring compliance with the Academy Trust's Equal Opportunities and Equalities Policies and taking an active role in promoting equality and diversity.
- Promoting the Academy Trust's policies on behavior for learning, and demonstrating a commitment to providing a caring and stimulating environment and improving standards for all pupils within the Trust.
- Undertaking such other duties as reasonably correspond to the general character of the post.
- Whilst every effort has been made to explain the main duties and responsibilities of the post, each individual task undertaken may not be identified.
- Employees will be expected to comply with any reasonable request from a manager to undertake work of a similar level that is not specified in this job Description.

This job description is illustrative and may be amended in discussion between the post holder and their manager.

PERSON SPECIFICATION

	Essential	Desirable
Qualifications & Training	<ul style="list-style-type: none"> • A level or equivalent • AAT Level 4, working towards or qualified by experience 	<ul style="list-style-type: none"> • University degree or equivalent
Experience	<ul style="list-style-type: none"> • Experience in a Finance department or accounting practice • Maintaining control accounts and related reconciliations • Management of accruals and prepayments • Good understanding of financial best practice, controls and procedures 	<ul style="list-style-type: none"> • Experience of working in a school environment
IT Skills	<ul style="list-style-type: none"> • Proficient Microsoft Office & Excel • Experience in a least one accounting package specifically used in the education sector 	<ul style="list-style-type: none"> • IRIS Financials • SBS Budgets
Data management	<ul style="list-style-type: none"> • Experience working with data of a confidential nature which is financially sensitive • Ability to analyse complex information & problem solving 	
Relevant Skills/Aptitudes	<ul style="list-style-type: none"> • Organised and thorough, with a good eye for detail • Ability to communicate effectively • Ability to build strong working relationships. • Ability to work effectively under pressure, managing conflicting priorities and meeting challenging deadlines • Ability to work independently 	<ul style="list-style-type: none"> • Previous experience of developing and delivering training programmes • Previous staff supervision experience
Other	<ul style="list-style-type: none"> • Contribute positively and play a proactive role in achieving individual and team objectives, to timetable and work plan. 	



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www.theswanschool.org.uk