



TRUE LEARNING  
PARTNERSHIP

# Trust Finance Officer

Role information





## Dear applicant

Thank you for your interest in the post of Trust Finance Officer for TRUE Learning Partnership (TLP). This is an exciting time to join our Trust, as the successful applicant will be part of our growing corporate team supporting the schools which make up our Trust.

TRUE Learning is a cross phase Multi Academy Trust established in December 2018 and is currently comprised of five Trust schools. Originally founded by both Poynton High School and Lostock Hall Primary School in December 2018, we now encompass Disley Primary School, Glossopdale High School and Hague Bar Primary School, each at various stages of development within our Trust.

We are seeking to appoint an enthusiastic, adaptable Finance Officer with the skills, passion, drive and initiative to be part of our highly successful growing Multi Academy Trust. This role allows for flexibility of hybrid working between our Trust Offices, our schools and home working. Our Trust Offices are currently located at Poynton High School but from September will be at our new offices at Cheadle Royal Business Park. We are very flexible in terms of hours and working pattern, and would consider full year working, if this is included with your application. We would ideally ask for a minimum of 30 hours per week. This role will include at least 4 weeks of school holiday working, in the summer, to support the year-end processes.

You will work with the Finance Business Partners to ensure effective and efficient management and administration of the Trust's financial systems and processes. You will be confident working with a variety of different stakeholders and working independently as part of a team.

Your application should be made via the application form on the Trust website. The supporting statement should set out what skills, experience, knowledge and personal qualities you believe you would bring to the post.

The closing date for applications is 10am on Monday 17<sup>th</sup> April 2023. Interviews will take place during w/c 24<sup>th</sup> April 2023.

We very much look forward to receiving your application to join our team.

Alison Ferneyhough  
Director of HR

## Job Description & Person Specification



Reporting to:	Finance Business Partners for TRUE Learning Partnership
Accountable to:	Chief Financial Officer for TRUE Learning Partnership
Salary Range:	CE Grade 7: £27,344 - £30,151 (full time/full year salary) This full year salary will be pro-rated as per actual working hours

To undertake effective and efficient administration of the Trust's financial systems and processes, within the framework of management and accountability established by the Trust Board and Senior Leaders. To work within the Trust Finance Team to contribute to the planning, development, organisation and maintenance of a financial support systems.

The Trust Finance Manager is responsible for:

1. Overseeing and undertaking key elements of the day-to-day financial administration needs of the academies within the Multi Academy Trust (MAT) accessing the central finance services.
2. Ensuring robust financial management is in place across the MAT in accordance with ESFA guidelines along with the Academy Trust Handbook (ATH) and the MAT's financial policies. Contributing towards the improvement and development of harmonised financial procedures and ensuring full compliance across the Trust.
3. Supporting and encouraging the Trust's ethos and its objectives, policies and procedures.
4. Providing guidance, training and support to all staff on financial matters.
5. Ensuring full awareness of changes in financial regulations and undertaking any necessary training to ensure that the best financial practices are followed, and compliance maintained.
6. Preparing financial reconciliations in a timely manner.
7. To manage the day to day operation of the finance function (transactions) within the Trust's schools. Including the line management of these finance staff with the relevant responsibilities associated with being a people manager.

### DUTIES AND RESPONSIBILITIES

The main duties and responsibilities are indicated below. Other duties of an appropriate level and nature may also be required, as directed by the CFO.

#### Finance Administration

- In conjunction with the CFO and Finance Business Partners (FBPs) and designated staff in the Trust schools, ensure the efficient day-to-day management of the Trust's Finance function. This will include adopting Access Requisitioning within the High Schools for maximum upstream/downstream process efficiencies. The role will include writing and keeping training material up-to-date and providing ad-hoc training to school staff, teaching or support, as required in how to transact appropriately.
- To guide and develop the Finance Teams in the Trust secondary schools to deliver financial services to corporate standards and to ensure maximum efficiency and effectiveness, including laying the foundations towards a centralised transaction-based team. Once established taking over the responsibility of the line management of these secondary school teams
- Responsible for ensuring that all bank accounts (including investment accounts, petty cash and credit card(s)), are reconciled on a monthly basis.

- Responsible for the processing of the SCA funding / Capital funding (excluding DFC), and investment accounts, to include monthly reconciliations in order to provide accurate information for cash flow forecasts as required to support the Chief Financial Officer.
- Coordinate and help manage the SCA annual internal 'bidding' process across all Academies.
- Post the payroll to the accounting system on a monthly basis including recharges across schools.
- In conjunction with staff with financial responsibilities across the Trust schools ensure the prompt and accurate payment of all supplier invoices.
- Managing the central supplier database adding suppliers to the database as required. Providing advice to the CFO when a new supplier request would seem inappropriate if we already have existing suppliers.
- Chairing working groups across the Trust to identify if purchasing synergies can be attained if we contract with preferred suppliers using the Trust purchasing power.
- In conjunction with staff with financial responsibilities across the Trust schools ensure all sales invoices are raised promptly, following up their prompt payment.
- In conjunction with the staff with financial responsibilities across the Trust schools ensure all income is posted to the finance system promptly.
- Prepare and process BACS runs in a timely manner.
- Responsible for preparing all Control Account reconciliations, funding analysis and reconciliations, debtors and credit control.
- Ensure that the Trust schools remain compliant with VAT requirements, including completion and responsibility for preparing and claiming the VAT returns in line with HMRC guidelines.
- Carry out returns and claims to external bodies including the Education & Skills Funding Agency, HMRC, etc. under the guidance of the CFO/FBPs.
- Ensure segregation of duties within the Finance team and in relation to the Trust's bank and investment accounts.
- Ensure that all finance manual and computerised records and filing systems are maintained as required.
- Organise regular Corporate Finance Team meetings, this aspect of the role will include setting agendas and retaining a record of outstanding actions.

### **Budgeting and Management Reporting**

- Assist the FBPs in producing material to support management information for review by the Chief Financial Officer, Senior Management Teams, and the Trust finance committees.
- In conjunction with the Chief Financial Officer and the FBPs, support the preparation of material for the individual academies and the Trust's annual budgets.
- In conjunction with the CFO monitor the liquidity position of the Trust. This will include preparing and updating cashflow models (combining operational cash flows and capital incomes/expenditure [including monitoring in year projects against the predicted cashflows]) so that we obtain a good rate of interest whilst always ensuring we can pay our liabilities as they fall due.
- In conjunction with the Chief Financial Officer and the FBPs, support the preparation of financial material for submission to the Education and Skills Funding Agency (ESFA).

### **Compliance**

- Ensure that all financial systems and processes across schools are carried out in accordance with the Academy Trust Handbook and Trust's financial policies, ensuring the CFO/FBPs is informed if the Trust's Finance Manual requires updating.
- Ensure compliance with data protection regulations.

## **General**

- Seek, consider, and act upon professional support and advice as required.
- Assist in the co-ordination of internal and external financial audits.

## **CORE RESPONSIBILITIES FOR ALL TRUST EMPLOYEES**

### **Health & Safety**

All staff within The TRUE Learning Partnership are required to remain vigilant, observe all relevant Health and Safety policies and procedures, take reasonable care of their own and others' Health and Safety, report all accidents and incidents, and raise concerns through their line manager, the Director of Business & Operations, the site management team or another member of SLT as appropriate.

### **Equality & Diversity**

Staff employed by The TRUE Learning Partnership are expected to promote equality of opportunity for all students and staff, both current and prospective, and to support an environment that values diversity and respect. The TRUE Learning Partnership believes that all individuals are of equal value and we are committed to equal opportunities for all.

### **Data Protection**

All staff within The TRUE Learning Partnership have a responsibility to ensure that data they are responsible for is accurate and appropriate to the needs of the organisation, and that they are responsible for ensuring any personal data processed for any purpose or purposes in connection with their role in the Trust shall not be kept for longer than is necessary for that purpose or those purposes, in accordance with GDPR 2018.

### **Safeguarding & Child Protection**

The TRUE Learning Partnership is committed to safeguarding and promoting the welfare of children and young people and expects all staff to share this commitment and adhere to, and comply with, the Trust's Safeguarding and Child Protection policy and procedures at all times.

Notwithstanding the detail in this job description, in accordance with the Trust's Flexibility Policy the job holder will undertake such work as may be determined by the Trust Senior Team from time to time, up to or at a level consistent with the Main Responsibilities of the job.

## Role requirements



	Essential	Desirable
<b>Qualifications</b>		
To have 5 GCSEs (or equivalent) A-C including Maths and English	✓	
To have a minimum of 3 years' experience in a finance function	✓	
To show evidence of continuous and relevant professional development.	✓	
To have a relevant A levels or a Degree.		✓
<b>Experience</b>		
To have experience working within a Finance Office	✓	
To have experience managing and administering budget and financial matters	✓	
To have recent experience in public or private sector administration using computerised management information systems	✓	
To have experience working with Microsoft Office applications	✓	
To demonstrate the ability to develop and monitor appropriate financial controls and processes.	✓	
To demonstrate excellent verbal, organisational and written communication skills.	✓	
To have a critical attention to detail	✓	
To be committed to the importance of confidentiality and the requirements of GDPR.	✓	
Experience of managing payroll processes	✓	
To have experience of developing school or academies financial systems.		✓
To have worked with Access/HCSS or other educational financial software and systems.		✓
<b>Skills</b>		
To demonstrate excellent interpersonal skills with ability to maintain strict confidentiality.	✓	
To show initiative and ability to prioritise one's own work and that of others to meet competing deadlines.	✓	
To display resilience and the ability to manage in high pressured environments.	✓	
To be able to follow direction and work in collaboration with Senior Management.	✓	
To be able to work flexibly, adopt a 'hands on' approach, and respond to unplanned situations.	✓	
<b>Other attributes</b>		
To be self-motivated and passionate about the delivery of quality service.	✓	
To demonstrate commitment to the highest standards of child protection.	✓	
To recognise the importance of personal responsibility for health and safety.	✓	
To have a commitment to own and team members' continuing professional development.	✓	
To believe in equality and celebrate diversity. To be committed to inclusion and the right for all to fulfil their potential.	✓	
To be willing to embrace change.	✓	
To show a commitment to upholding the Trust's vision and values.	✓	
To demonstrate professional and personal integrity.	✓	



## **Additional Factors**

### Safeguarding

TRUE Learning is committed to safeguarding and promoting the welfare of children and young people and expects all trustees, local governors, staff and volunteers to share this commitment. The appointment will be subject to an enhanced DBS check and satisfactory references.

### Mobility

This post will require regular travel between all schools in the Trust. Therefore, the post holder will need to have a valid driving licence and access to a vehicle that can be used for work purposes.

## **Key information regarding the application process**

### **Further details**

For further details or to arrange an informal conversation about this role, please contact the HR team via [recruitment@truelearning.org.uk](mailto:recruitment@truelearning.org.uk)

### **To apply**

Applicants are requested to submit a completed application form which is available from the Trust website [www.truelearning.org.uk](http://www.truelearning.org.uk)

### **Closing date**

The closing date for applications is 10am on Monday 17<sup>th</sup> April 2023

Interviews will take place during w/c 24<sup>th</sup> April 2023

*The TRUE Learning Partnership is an inclusive Equal Employment Opportunity employer that considers applicants without regard to gender, gender identity, sexual orientation, race, ethnicity, disabled or veteran status, or any other characteristic protected by law. We welcome applications from all individuals regardless of individual background or circumstance.*

*The TRUE Learning Partnership is committed to safeguarding and promoting the welfare of all children and young people and preventing extremism; all staff must ensure that the highest priority is given to following the guidance and regulations to safeguard children and young people.*

*The successful candidate will be required to undergo an Enhanced Disclosure from the Disclosure and Barring Service (DBS) and obtain any other statutorily required clearance including an online check. Employment will also be conditional on the receipt of at least two acceptable references (one of which must be from the current/latest employer) and evidence of the formal qualifications required for the role.*

## Trust vision and ethos



TRUE Learning Partnership's vision, as a community-based Trust, is that all its students will benefit from an outstandingly rich and broad education within its ethos and values.

### Vision

A community focussed, values based, learning organisation that meets the needs of all its stakeholders so that all will achieve.

### Values

Serve our communities with 'An unswerving commitment to ensure every young person achieves their potential, whatever their circumstances'.

Every child, every chance



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## Information regarding the constitution of the Trust Board

The constitution of the Trust Board is set out in the Articles of Association. Trustees are appointed / elected or co-opted for a period of four years. The Chair of Trustees is elected every four years. Trustees appoint the Chief Executive Officer to assure the strategic intentions of the Multi Academy Trust.

The Chief Executive is also a trustee director of the Multi Academy Trust. As per the scheme of delegation, the CEO and Trustees work in partnership with the local governing bodies to appoint Headteacher's to take responsibility for the day-to-day management of the individual schools.

The regular meeting of Trust management and local Headteachers will be facilitated through the Trust Executive Strategic Group to help facilitate the sharing information and expertise, to aid efficient working and to help provide creative solutions to the many challenges in the current educational landscape.



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## Why work for the Trust?



TRUE Learning is a community based, values focused, cross phased multi academy trust based across Cheshire and Derbyshire. All five academies in the Trust are closely located to one another which lends itself to many opportunities to work closely and collaboratively. Our vision is a community based, values focused, learning organisation that meets the needs of all its members so that all will achieve. By working within our community clusters, we will ensure that every child that is presented to us at the age of 3 is the best they possibly can be by the time they leave us at 18.

All our schools have excellent road links from the M56, M60, M67, A6, A34 and A57 and nearby railway stations of Poynton, Hadfield, Disley, and New Mills Central. For those travelling from further afield, both Stockport railway station on the West Coast mainline and Manchester Airport are both nearby.

We are exceptionally proud of our staff and the dedication they display every day to support our students to reach their potential. Whether a member of our Leadership Team, Teaching Staff or Support Team – all have a vital role to play in providing an environment where we can provide world class education where all can achieve.

We offer highly competitive salaries, pension scheme membership, free on-site parking and regular social events. All staff are able to access discounted gym memberships and other negotiated benefits across the Trust.

The Trust provides an Employee Assistance Programme through Health Assured which offers a wide range of services including legal and wellbeing support for employees and their families.

The Trust places at the heart of its development a commitment to high quality professional development for all staff who join the Trust. The CPD@TTLP programme enables all of our staff to access development opportunities across the Trust. Future goals and aspirations are supported through this programme to ensure that all staff are able to develop and achieve their own personal goals.

Staff wellbeing and providing a positive and healthy working environment is a key priority for us, as supporting all of our staff enables them to support all of our students. Our Director of Health and Wellbeing leads this key area working with senior staff across the multi academy trust. We are very pleased that our commitment to staff wellbeing has been recognised by the Valued Worker scheme which offers accreditation to workplaces where staff feel valued.

We are also committed to supporting mental health in the workplace by training a number of teaching and support staff across our Trust to be Mental Health First Aiders and through our work with the Time to Change programme which aims to end mental health discrimination in the workplace.



## Information about our academy schools



### Poynton High School

We are a very special school where the whole school team passionately believe in creating a school that truly meets the needs of all in our learning community. This is embodied in our mission statement which serves to guide us in the long-term planning for our school.

“We will inspire and empower all in our learning community to fulfil their individual potential and ambitions so that all are able to be active and successful citizens in our global society”

This can be summed up in three words, INSPIRE ACHIEVE CELEBRATE and is applied to every aspect of our work. We aim to inspire our young people in all of our work so that they may achieve their full potential and at the heart of this lies a truly celebratory culture; we aim to inspire our team, so that you can achieve, and we celebrate every achievement for everyone - staff and student. (Matthew Dean, Head Teacher)



### Lostock Hall Primary School

We are a growing (205 students) Primary School, serving children from the age of 3 to 11. We are a safe, stimulating and friendly school which provides an inclusive, calm, caring and productive learning environment. Our aim is to challenge and support each other and every child to help them realise their potential and to make a positive difference to their lives. Children leave Lostock Hall Primary school very well prepared for their future learning at secondary school and beyond.

Through our guiding principles of Be Ready, Be Respectful and Be Safe we deliver a carefully designed curriculum which progressively meets the needs of our children through fun learning and leads to excellent outcomes. (Graham Hamilton, Head Teacher)



### Disley Primary School

Our school is a very special place to be. We pride ourselves on being a happy, caring school where each child is valued as an individual. We aim to provide a stimulating learning environment which allows every individual to fulfil his/her potential.

We constantly seek exciting ways of delivering both the Foundation Stage and National Curriculum requirements, along with opportunities for social and moral development. Our children are at the heart of everything we do. (Jake Nicklin, Headteacher)



## **Glossopdale School**

Our School is a warm and caring community for all of our 1244 students, from when they join us in Year 7 to when they leave us in Year 13. We are a school that has the highest expectations of students and ourselves, where every student is expected to work hard, behave well and contribute positively to the school community.

Our core purpose is to support students of all abilities and backgrounds to develop high aspirations and achieve their potential. We do this by nurturing and building ambition for our students, we open opportunities, broaden horizons and introduce challenges ensuring everyone can thrive, both academically and personally, to be the best that they can be.

We are in the very fortunate position to work within a new purpose-built school which opened in September 2018. This has benefitted staff and students in so many ways. Our students learn in a modern, open and inclusive environment which has been designed to reflect and compliment the local landscape. (Debbie McGloin, Executive Head Teacher)



## **Hague Bar Primary School**

Here at Hague Bar Primary School, we have worked hard to develop a school which provides an excellent education by helping each child to achieve her or his full potential. Our skilled staff foster a happy and caring atmosphere, where children can succeed through our personalised learning process, ensuring no child is left behind.

The origins of Hague Bar Primary School stretch all the way back to 1854, with a school which was in existence at the Strines Print Works. Hague Bar Primary School is just inside the Derbyshire border. It lies between the town of New Mills in Derbyshire and Strines in Cheshire. The school is situated on the edge of the countryside and enjoys stunning views of fields and distant hills.

We are proud of, and celebrate, the achievements of our children, both in and out of the classroom, and we are here to help your child make the most of their potential. (Karen McCurdy, Head of School)

# TRUE LEARNING PARTNERSHIP: SCHOOL LOCATIONS



Our partnership of primary and secondary schools is located to the south-east of Manchester, close to the natural beauty of the Peak District National Park.

All our schools have excellent road links from the M56, M60, M67, A6, A34 and A57 and nearby railway stations of Poynton, Hadfield, Disley, and New Mills Central.

For those travelling from further afield, both Stockport railway station on the West Coast mainline and Manchester Airport are both nearby.

## Trust Safeguarding Statement



TRUE Learning (TL) recognises the important role that our schools and their staff have in the wider safeguarding system for children. **ALL** staff have a responsibility to provide a safe environment in which children can learn. The Trust fully adopts statutory guidance "Keeping Children Safe in Education" (September 2022).

TRUE Learning is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment. Our schools are a safe place for children, where our responsibilities for safeguarding children are taken seriously. As a Trust, we are responsible for ensuring that all our schools have thorough and robust child protection and safeguarding policies and procedures.

Should you have safeguarding concerns regarding any pupil at any of our schools, please speak to one of the Designated Safeguarding Leads at that school. Full details of key contacts for safeguarding in each of our schools is listed below.

The Trust's Designated Safeguarding Officer is Catherine Holyland, Safeguarding Lead and Deputy Head Teacher at Poynton High School. If you wish to contact her directly please email [cholyland@truelearning.org.uk](mailto:cholyland@truelearning.org.uk)

The Trust Board safeguarding representative is Lucy Monk. If you wish to contact her, please email [info@truelearning.org.uk](mailto:info@truelearning.org.uk) stating that the email relates to a safeguarding issue.

Our schools' Local Governing Bodies are regularly updated about child protection, bullying and safeguarding policies and practices by the relevant school Head Teachers, and other members of the Senior Leadership Team. This information is reported to the Trust Board.

For further details on roles and responsibilities, and recording information regarding Safeguarding, please see the Safeguarding Policy and Procedures documents held by each school in our Trust.



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