



Regional Assistant Finance Manager
INFORMATION PACK FOR CANDIDATES



Dear Applicant

Thank you for your enquiry regarding the position of **Regional Assistant Finance Manager** at Oasis Academy John Williams.

I hope you find the information pack helpful. If you feel that that this is a post for which you would like to apply, please complete the Application Form – (CVs are not accepted) and return it to Claire Warren, HR Officer, by either of the following ways:

Email: hr@oasisjohnwilliams.org

Post: Oasis Academy John Williams
Petherton Road
Hengrove
Bristol
BS14 9BU

The closing deadline for applications is no later than **9.00am on Friday 5 July 2019**.

Please ensure you provide the name, address and status of two referees, one of whom should be your current direct Manager. Candidates should be aware we will seek references on shortlisted candidates for Academy based positions and may approach previous employers for information to verify particular experience or qualifications before interview.

Interviews will be held week commencing **w/c 8 July 2019**. If you have not been invited to attend by **Wednesday 10 July 2019**, you should assume that your application has not been successful. Unfortunately, we will not be able to provide feedback on your application at this stage.

If you would like to know more about us before you apply please see our website www.oasisacademyjohnwilliams.org, or if you are not clear about any aspect of the application procedure, do not hesitate to contact us for clarification.

I wish you well and thank you once again for your interest in what we think will be a challenging and rewarding post.

Yours sincerely

A handwritten signature in black ink, appearing to read 'Claire Warren'.

Claire Warren
HR Lead

Explanatory Notes

Applications will only be accepted from candidates completing the enclosed Application Form. Please complete ALL Sections of the Application Form which are relevant to you as clearly and fully as possible. CVs will not be accepted in place of a completed Application Form.

Safeguarding Children & Young People

We are committed to safeguarding and promoting the welfare of children and young people. We expect all staff to share this commitment and to undergo appropriate checks, including enhanced DBS checks

1. Candidates should be aware that all posts in Oasis Community Learning involve some degree of responsibility for safeguarding children and young people, although the extent of that responsibility will vary depending on the nature of the post. Please see the job description enclosed in this Application Pack for further details.
2. Accordingly this post is exempt from the Rehabilitation of Offenders Act 1974 and therefore all convictions, cautions and bind-overs, including those regarded as "spent" must be declared.
3. If you are currently working with children, on either a paid or voluntary basis, your current employer will be asked about disciplinary offences, including those related to children or young people (whether the disciplinary sanction is current or time-expired), and whether you have been the subject of any child protection allegations or concerns and if so the outcome of any investigation or disciplinary proceedings. If you are not currently working with children, but have done in the past, that previous employer will be asked about these issues.
4. Where neither your current or previous employment has involved working with children, your current employer will be asked about your suitability to work with children, although it may where appropriate be answered not applicable if your duties have not brought you into contact with children or young people.

Interview Process

After the closing date, short listing will be conducted by a Panel, who will match your skills/ experience against the criteria in the Person Specification. You will be selected for interview entirely on the contents of your application form, so please read the Job Description and Person Specification carefully before you complete your form.

All candidates invited to interview must bring the following documents:

- Documentary evidence of right to work in the UK
- Documentary evidence of identity that will satisfy DBS requirements such as a current driving licence including a photograph and/or a passport and/or a full birth certificate
- Documentary proof of current name and address (i.e. utility bill, financial statement etc.)
- Where appropriate any documentation evidencing a change of name
- Documents confirming any educational or professional qualifications that are necessary or relevant for the post.

Please note that originals of the above are necessary. Photocopies or certified copies are not sufficient.

We will seek references on shortlisted candidates for Academy based positions and may approach previous employers for information to verify particular experience or qualifications before interview. Any relevant issues arising from references will be taken up at interview.

For Academy based positions, in addition to candidates' ability to perform the duties of the post, the interview will also explore issues relating to safeguarding and promoting the welfare of children, including:

- 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
- Attitudes to use of authority and maintaining discipline

Conditional Offer: Pre-Employment Checks

Any offer to a successful candidate will be conditional upon: -

- Verification of right to work in the UK
- Receipt of at least two satisfactory references (if these have not already been received)
- Verification of identity and qualifications
- Vetting and Barring Check
- Satisfactory DBS Disclosure
- Verification of professional status such as QTS Status, NPQH (where required)
- Satisfactory completion of a Health Assessment
- Satisfactory completion of the probationary period
- Where the successful candidate has worked or been resident overseas in the previous five years, such checks and confirmations as may be required in accordance with statutory guidance

For teaching posts

- Verification of successful completion of statutory induction period (applies to those who obtained QTS after 7 May 1999)
- Verification of medical fitness in accordance with DfES Circular 4/99 Physical and Mental Fitness to Teach of Teachers and Entrants to Initial Teacher Training

You should be aware that provision of false information is an offence and could result in your application being rejected or summary dismissal if you have been selected, as well as possible referral to the police and/or other relevant investigating bodies.

Regional Assistant Finance Manager – Bristol Cluster

Job Description

Post:	Regional Assistant Finance Manager, Oasis South Bristol Cluster	Salary:	Starting at SCP 25 £28,785
Location:	Regional Office at Oasis Academy John Williams but may be required to visit other academies within the Cluster	Working Pattern:	Full time – 37 hours a week all year round
Disclosure Level:	Enhanced		

Job Purpose:

Provide assistance to the Regional Finance Manager as part of the Regional Leadership Team to Academies within the cluster for developing, leading and managing the Academy budgets, maximising grant funding, developing and implementing strategies, key objectives, systems, processes and procedures relating to finance and best value. Presenting clear and concise financial information both verbally and in written form to a range of audiences.

Assisting the Regional Finance Manager, the post holder will ensure that the Academies are in compliance with group policy (including the Finance Handbook, Management and Audit reports, Scheme of Delegation and any such other policies as stipulated by the OCL Board) and will be expected to assist in providing clear direction to Regional Directors (RDs); Academy Principals; finance teams and to support and challenge Academies in all aspects of financial management, governance and administration.

Responsible to:

Regional Finance Director – South Bristol Cluster

Additional: Key Relationships

Regional Finance Staff, Regional Finance Manager, National Head of Academy Finance, Regional Academies Director, Academy Principals, Academy Operations Managers

Specific Responsibilities

1. To ensure the production of periodic budget monitoring reports, internal control checklists, audit workbooks and supporting information as required by the Academies and National Office
2. To assist in the production of sustainable annual budgets and long term financial plans for all Academies within the cluster
3. To understand Academy funding and to assist in maximising Academy income and advising the Academy Leadership Teams of best practice

4. To assist the Regional Finance Director in ensuring that Academies within the cluster make the best possible use of resources through effective strategic planning, including consideration of all financial implications ensuring value for money
5. To help to monitor Academies against established benchmarks and identify opportunities for savings
6. To assist in the management of cluster transaction processing/ procurement
7. To report financial activities of the cluster to the Regional Finance Manager in line with specified reporting deadlines
8. In the absence of the Regional Finance Manager, to have responsibility for the management of key finance personnel within the regional team
9. To assist the Regional Finance Manager with the management of all financial aspects of new Academies opening within the cluster

DUTIES (COVERING ALL ACADEMIES WITHIN THE CLUSTER):

Resources

- Assist in ensuring the Academy makes the best possible use of resources through effective planning, considering all financial and other resource implications
- Approve and monitor payroll returns and carry out reconciliations with budget
- As a member of the Regional Leadership Team, to contribute to the strategic direction of the Academies and the development and implementation of the Academy Development Plan
- Assist in optimising the benefit to the Academies of funding from grants and other sources, by identifying funding opportunities, ensuring that opportunities are fully utilised, interpreting criteria and advising colleagues within the Academy Leadership Team to ensure that funding is appropriately used
- Assist in the development a three year financial plan for each Academy, taking into account DFE and relevant government guidelines and other sources of information in accordance with government budgets and within the parameters set by the OCL board and utilising the OCL budgeting template
- Prepare the monthly management accounts, forecasts and other financial and non-financial reports of the Academy explaining all significant variances to all relevant stakeholders, in accordance with agreed timetables, presenting reports to the Regional Finance Manager for discussion with Principals and the National Office.

Systems

- Continue to develop and maintain a regional transactional processing centre
- Ensure that the Academies are compliant with group policies and assisting the Regional Finance Manager in ensuring that all of the Academies financial processing and reconciliations are performed as outlined in the OCL Finance Regulations
- Assist in providing systems and accounting support to Academies and the regional processing team

Management

- Alongside the Regional Finance Manager, provide strategic support to the Principals and Academy Councils on all aspects of Academy business management
- Support the Regional Finance Manager to manage all aspects of finance across the Academies.
- In the absence of the Regional Finance Manager, supervise designated finance staff working collaboratively to ensure best value for money across the Academies and provide effective support, guidance, challenge and information
- Assist the Regional Finance Manager in providing support, guidance, challenge and information to budget holders

- During preparation of management reports, use financial management information, especially benchmarking tools, to identify areas of relative spending, assess trends and directly advise the Principals and other members of the Academy Leadership Groups accordingly

Internal and external audit

- Assist the Regional Finance Manager during internal and external audit visits and reporting, answering queries in a timely manner, and assisting in the implementation of suggested improvements

The duties of this post may vary from time to time without changing the general character of the post or level of responsibility entailed.

The person undertaking this role is expected to work within the policies, ethos and aims of the Academy and to carry out such other duties as may reasonably be assigned by the Principal. The postholder will be expected to have an agreed flexible working pattern to ensure that all relevant functions are fulfilled through direct dialogue with employees, contractors and community members.

Health and Safety Statement

So far as is reasonably practicable, the postholder must ensure that safe working practices are adopted by employees, and in premises/work areas for which the postholder is responsible, to maintain a safe working environment for employees and service users. These are defined in the Oasis Community Learning Health and Safety policy, departmental policies and codes of practice.

Safeguarding Statement

Oasis Community Learning is committed to the safe guarding of all of its young persons and expects all staff, volunteers and adults to work within the parameters of the policies and procedures as agreed by the Executive Board to ensure the safety of all young persons within its care.

Safeguarding Children

Oasis Community Learning is committed to safeguarding and promoting the welfare of children and young people.

We expect all staff to share this commitment and to undergo appropriate checks, including enhanced DBS checks.

The duties of this post may vary from time to time without changing the general character of the post or level of responsibility entailed

Person Specification

Our Purpose

Oasis Academies exists to provide a rich and balanced educational environment which caters for the whole child - academically, socially, morally, spiritually, physically, emotionally and environmentally. Our task is to serve our students as well as to provide a learning hub for the entire community. In this way we will raise aspirations, unlock potential and work to achieve excellence through encouraging a 'can do' culture which nurtures confident and competent people.

Oasis Community Learning Ethos

Our ethos is an expression of our character, it is a statement of who we are and therefore has to be the lens through which we assess all we do. Our values can be summarised in five statements:

1. A passion to include everyone
2. A desire to treat everyone equally, respecting differences
3. A commitment to healthy and open relationships
4. A deep sense of hope that things can change and be transformed
5. A sense of perseverance to keep going for the long haul.

	Essential	Desirable
Qualifications	<ul style="list-style-type: none">• Educational qualifications to A level standard or equivalent• Professional qualifications in Finance or ability to demonstrate competency through proven experience in a similar role	<ul style="list-style-type: none">• Level 4 + Professional qualification e.g. CIPFA, AAT, ACCA
Professional Development	<ul style="list-style-type: none">• Evidence of a commitment to own professional development	<ul style="list-style-type: none">• Recent relevant in-service training in Finance related areas
Experience	<ul style="list-style-type: none">• Financial Management experience including regular, efficient and detailed monitoring of accounts against spending and budget plans• Proficient in use of MS Excel spreadsheets, MS Word and computer based accounting packages	<ul style="list-style-type: none">• Previous experience of working in school finance• Experience of Financial Systems• Experience of working in a highly confidential environment
Knowledge	<ul style="list-style-type: none">• Detailed knowledge of financial planning and budgetary control processes, being able to lead the development of the 3 year financial plan• Able to work under pressure and balance strategic and planning activities• Strong organisational and record keeping skills	
Skills	<ul style="list-style-type: none">• An enthusiastic and effective team player with the ability to lead and manage others	<ul style="list-style-type: none">• High level ICT skills including proficient use of e-mail and the internet

	<ul style="list-style-type: none"> • Excellent communication, presentation and ICT skills • Experience of working with numerical data and the ability to produce accurate and detailed statistical analysis and reports • Ability to work under pressure and balance strategic and planning activities • Excellent prioritisation and time management skills and the ability to work effectively and efficiently within set deadlines and tight timescales • High levels of tact, diplomacy, discretion and ability to demonstrate absolute respect for the confidentiality of information gained as a result of working within a school 	
Personal Qualities	<ul style="list-style-type: none"> • Commitment to safeguarding and promoting the welfare of children and young people. • Willingness to undergo appropriate checks, including enhanced DBS checks. • Motivation to work with children and young people • Ability to form and maintain appropriate relationships and personal boundaries with children and young people • Have a willingness to demonstrate commitment to the values and behaviours which flow from the Oasis ethos. 	