





 **Welcome from the CEO, John McNally**

June 2019

Dear Applicant,

Thank you for taking an interest in the Finance Assistant vacancy which are based at Shelley College, working in our Central Finance team. I hope the materials enclosed in this pack give you a good sense of what makes the trust a special place to work and provides the information you need about the post.

Our belief in “Valuing People, Supporting Personal Best” means we are committed to investing in our staff, to help them be happy at work, to provide the support they need to achieve the highest standards they are capable of and to offer the training or guidance they need to undertake their jobs effectively. For example, everybody is encouraged to use a personal development plan, to set their own objectives and to take responsibility for their own improvement priorities. We define effective leadership as “helping others to achieve their best” and that is what your line manager will try to do for you.

It is important to read the information provided carefully. We want you to be happy in the role you are applying for and committed to performing the job to the best of your ability.

I very much hope you are encouraged to apply for the position and look forward to meeting you soon.

Yours faithfully,



**John McNally**

SHARE Multi-Academy Trust is a charitable trust currently consisting of three secondary and five primary schools in West Yorkshire. Our schools are: Shelley College, Huddersfield; Heaton Avenue Primary School, Cleckheaton; Millbridge Junior, Infant and Nursery School, Liversedge; Cowlersley Primary School, Cowlersley; Royds Hall Community School, Beech Primary School and Luck Lane Primary School, Huddersfield.

We believe in helping staff and students achieve their personal best and are keen to recruit the very best talent to our Trust.  As well as being part of the Trust, some of our schools are National Support Schools and National Teaching Schools and as such, we can offer our staff a wealth of career development opportunities and the support you need to enjoy your role.

More than six hundred people work hard across the Trust to ensure we provide the very best education and service across all our schools, from invigilators joining us for a few hours a year, through flexible part-time work to many full-time teaching and support roles.

At SHARE MAT, we aim to:-

* Encourage all our students/pupils to go beyond what they think they can achieve, to enjoy learning, helping them to lead healthy and happy lives;
* Equip our staff to deliver their best every day, our belief is that by Valuing People, Supporting Personal Best is the key;
* Ensure our staff are happy at work, taking pride in students/pupils progress and development;
* Deliver training and guidance relevant to job role so expectations are understood and staff feel motivated;
* Offer great benefits making us the employer of choice, including outstanding CPD, supportive line management and networking opportunities across the MAT to aid personal development.

If you share our passion for challenging, improving and making our schools the best they can be, we’d love to hear from you.



**Finance Assistant Role Profile**

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| ­Role Title | Finance Assistant | ***Reporting to*** | Financial Accounting Officer |
| ***Section*** | Finance |  |  |
| ***Contract type*** | Permanent, 37 hours per week, 52 weeks a year.  Some flexibility in hours is required (e.g. occasional evening meetings).  Flexible to work across all school sites with the MAT. | ***Grade / Salary*** | Band D |

# Part A – JOB DESCRIPTION

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| ***Overall purpose of role*** | To provide an efficient and customer focused Finance service across the Trust’s schools in accordance with SHARE Objectives, Policy and Procedures and legislative requirements to meet operational needs. |
| ***Safeguarding Requirements*** | This post requires the post holder to work in settings with children and young adults. Any employment offer is therefore subject to the results of an Enhanced Disclosure from the Disclosure and Barring Service (DBS). People who may have contact with younger children (i.e. primary school age) are also required to complete a declaration about family or other members of their household.  Applicants MUST complete the MAT’s standard application form to be considered, will be required to provide evidence of identity and qualifications and offers of employment will be subject to satisfactory references. For applicants who work or have recently worked in a school, one of the references must be from the headteacher. |

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| ***Key Outputs*** |
| 1. Maintaining productive and effective working relationships with schools within the trust through regular communication and support. |
| 1. Under the direction and guidance of the Financial Accounting Officer, deliver an effective financial accounting service, ensuring transactions are processed in an efficient and timely manner, ie    1. Maintain supplier and customer databases;    2. Processing purchase ledger orders generated from requisitions raised at school level (paper and web based), accurately and in accordance with agreed authorisation and timescales;    3. Distributing purchase ledger orders to suppliers and budget holders as required;    4. Processing purchase ledger invoices, checking to orders and goods received notes, and ensuring appropriate authorisation;    5. Processing purchase ledger payments in accordance with supplier payment terms;    6. Investigating and resolving purchases under query, arranging returns and ensuring replacements, refunds or credit notes are received;    7. Raising sales ledger invoices from appropriate documentation;    8. Distributing sales ledger invoices and statements to customers;    9. Under the direction and guidance of the Financial Accounting Officer, follow debt collection procedures;    10. Processing income, banking and direct debits;    11. Maintain school fund income and expenditure accounts;    12. Dealing with queries from suppliers, customers, budget holders and colleagues in the trust’s schools; and    13. Create and maintain files and record keeping in association with the above. |
| 1. Under the direction and guidance of the Financial Accounting Officer, assist with the following:  * Internal journals and recharges; * VAT return analyses; * Payroll analyses and recharges (including payments to 3rd parties, ie HMRC, pension schemes, etc.); * Cash flow forecasts; * Month end procedures; and * Year end procedures. |
| 1. Under the direction and guidance of the Financial Accounting Officer, observe the trust’s financial regulations, policies, procedures and controls. |
| 1. Under the direction and guidance of the Financial Accounting Officer, assist with the maintenance of external and internal audit files. 2. Under the direction and guidance of the Financial Accounting Officer, maintain the trust’s Asset Register, and assist with periodic inspections of assets. 3. Commit to and work towards delivering an outstanding education for children and young people in our schools, taking appropriate action to ensure that team members do likewise. |

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| ***Dimensions*** *(Financial/Statistical/Mandates/Constraints/No. of direct reports)* |
| * Range of Teachers / Support Staff of 500 to 1000. * Number of direct reports - 0. * Number of sites – up to 12 |

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| ***Work/Business contacts*** |
| **Internal:** School staff (generating orders from requisitions raised at school level, and delivery of goods/services). |
| **External:** Auditors (internal and external), Audit & Risk Committee, Suppliers, Customers, Parents (income). |

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| ***Expertise in Role Required (At selection - Level 1)*** | **Essential or**  **Desirable** |
| 1. NVQ in accounting and finance, or equivalent | Desirable |
| 1. Proven experience of working in a finance or accounting environment. | Essential |
| 1. Excellent numeracy skills. | Essential |
| 1. Experience of using computerised accounting packages alongside word and spreadsheet packages | Essential |
| 1. Excellent communication skills both written and verbal. | Essential |
| 1. Experience of education sector. | Desirable |
| ***Other (Physical, mobility, local conditions)*** | |
| 1. Has the ability to travel around the trust area (and when required, throughout the UK). | Essential |
| 1. Is willing to work flexibly within scope of overall hours, e.g. occasional evening meetings. | Essential |
| 1. Has a full current UK/European Driving Licence. | Essential |
| 1. Has access to a motor vehicle and is prepared to use it for business purposes. | Essential |

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| ***Expertise in Role - After initial development - Level 2*** |
| * Has a good understanding of the use and application of the trust’s accounting systems, processes and procedures. |
| * Is able to work on own initiative ensuring goods/services are delivered to schools promptly, suppliers are paid on time, and transactions are processed accurately. |
| * Has detailed knowledge and understanding of the trust’s financial regulations, policies, procedures and controls, and can apply them in the work setting. |
| 1. Has detailed knowledge of the trust and school structures and organisation. |
| 1. Has successfully developed contacts with people, both internal and external. |

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| ***Expertise in Role (Advanced - Level 3)*** |
| * Has an extensive understanding of the use and application of the trust’s accounting systems, processes and procedures, and can train colleagues in their use. |
| * Is viewed by schools and the central finance team as a reliable, efficient and supportive colleague, and a team player. |
| * Has identified and utilised good practice within the trust to improve service delivery. |

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| Signatures |
| Approved by : CEO    Approved by : Post Holder/or Representative |

