

Senior Finance Officer

For Autumn 2019
Candidate Information Pack



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**We believe in
ourselves.
We believe in each
other.**

Welcome from the Chief Financial Officer



Dear Candidate,

Thank you for your interest in working for the Finance Team of Folio Education Trust as we look to expand and improve the support and service we offer.

The Finance Function forms a critical element of our Shared Services model, which is in place to serve all four Schools within the Trust, as well as the Croydon School Sports Partnership. The overall aim is to provide a service that listens to and understands the needs of people being served, anticipates how these needs will change and acts promptly to deliver. Other Shared Services include IT, Estates, Catering, HR, Marketing and Compliance.

We work closely with the Headteachers of each school to ensure to we are continuously progressing against our goals in supporting them and we measure performance against specific metrics.

As a Finance team we are looking to streamline processes and to improve the quality, timeliness and relevance of analyses that we produce. This will naturally lead to improved support for the Headteachers and Senior Leaders in the schools and Trust, enabling us to achieve maximum value for money and make optimal decisions in supporting our students.

As we get closer to moving into our brand new facility at Coombe Wood School in 2020, we are looking forward to bringing the whole team together in one place, which will further improve our efficiency and lead to the continuing development of a first class service team.

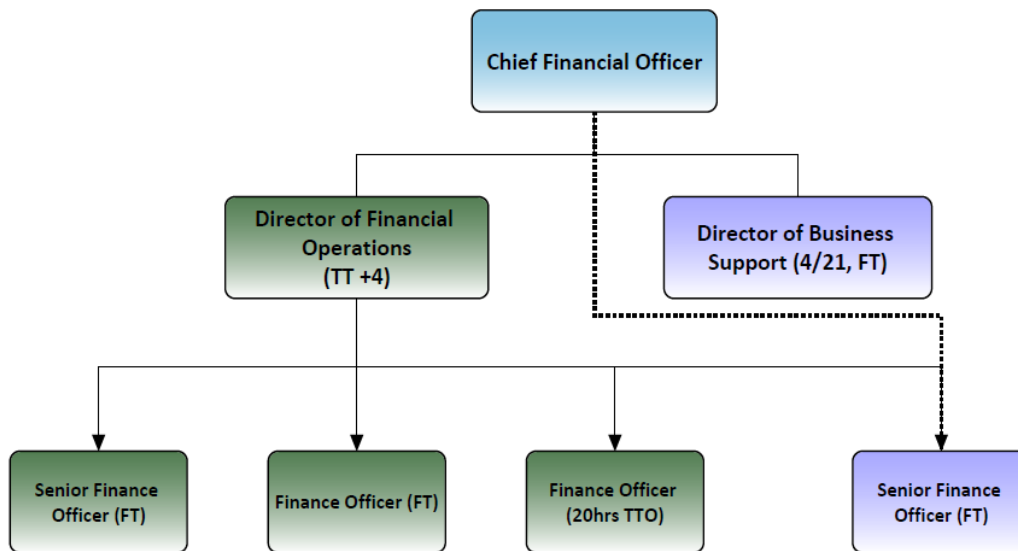
Growth of the Trust is guaranteed over the next 4 years as Coombe Wood continues to expand, but we also aim to attract new schools to join the Trust as well as looking at opportunities to provide support outside the trust to other partners. This desire to grow further will ensure that the successful candidate will have the opportunity to progress in their role and career.

Our aim is to develop a strong team with a variety of skills that is able to support one another across the Trust, to ensure that we successfully and efficiently deliver our objective of providing world class support of our customers.

If you enjoy variety in your working day, are skilled in the above areas, diligent, organised and will commit to what Folio Shared Services is trying to achieve then we would love to hear from you.

Mr Richard Baker FCA
Chief Financial Officer
Folio Education Trust

Folio Education Financial Shared Services Organisation Chart



The Finance Provision

The Finance Provision falls broadly into 2 areas: Transactional Processing and Reporting and Business Support and Analysis. Our aim to develop and improve our service in both these areas to ensure our customers are able to receive the correct goods and services to support their operations, and to receive relevant, accurate and timely information and analyses upon which to make optimal decisions

This role will encompass responsibilities in both these areas, primarily supporting the 2 Primary schools, but also with some Trust wide activity aimed at supporting both the Director of Financial Operations, and the Chief Financial Officer. There will be the opportunity for interaction with Senior Leaders in the Trust, and this role will have a significant impact on helping the Trust to move forward overall.

Job Description – Senior Finance Officer

The Senior Finance Officer will have responsibility to support the finance team delivering a share service across four schools.

The focus of the role is ensuring high standards of accurate and timely information to inform and support decision making and contribute with the smooth, efficient running of the four Schools.

Grade & Salary Range	5/6 SP 12 – 20 (£24,462- £28,215 FTE)
Base School	To be confirmed, Coombe Wood from 20/21
Contract	Permanent Full Time preferred but Term Time only as a minimum commitment
Working Pattern	(36 hours per week preferred but negotiable)
Responsible to:	The Director of Financial Operations (DFO).

Responsibilities

Monthly Management Accounts, Forecasting & Annual Budgeting

- Work closely with the DFO in the month end close process for Park Hill Junior School (PHJS) & St Peter's Primary School (SPPS).
- Preparing the monthly management accounts and commentary, including KPI's for PHJS & SPPS.
- Review and update the analyses provided to the Headteachers and senior leadership teams of PHJS & SPPS as guided by the Chief Financial Officer (CFO).
- Work closely with the CFO to provide ad hoc analyses for the schools as required.
- Assist the CFO in the preparation of Forecasts and Budgets for PHJS & SPPS as well as other trust areas as required.
- Work closely with the DFO to prepare and submit returns to the ESFA as required.

Ordering of goods and services for PHJS & SPPS

- Researching supply & delivery of goods and services where necessary.
- Obtaining quotes to ensure best value for money.
- Ensuring that necessary authorisation procedures have been followed prior to placing orders.

- Converting authorised requisitions to orders, sending orders to suppliers and liaising with suppliers regarding delivery dates.
- Placing online orders where necessary.
- Ensuring that budget holders have entered a goods received note on receipt of orders.
- Issuing reports to budget holders regarding outstanding orders and goods received notes.
- Entering annual orders to PS Financials.
- To ensure that all systems documentation is maintained and updated as required including the IT Inventory.

Maintaining the purchase ledger activity for PHJS & SPPS

- Matching invoices received to outstanding GRNs on PS Financials.
- Entering invoices to PS Financials.
- Investigation of any differences between invoices and orders.
- Analysing and reconciling supplier balances.
- Setting up new suppliers on PS Financials where appropriate.

Parental and other Voluntary Donations Analysis

- Review the current system for monitoring and analysing all voluntary donations across the Trust.
- Collate all standing order and gift aid forms received in the finance department. Send standing orders to banks and maintain the files of active standing order and gift aid forms.
- Update the donations database on a weekly basis with all parental donations received.
- Reconcile donations received to the bank statements.
- Arrange the transfer of funds from the schools' PTA.
- Report monthly totals DFO.
- Preparation of the Gift Aid Claim to HMRC.

Effective Day to Day Management:

- Be aware of and comply with policies and procedures relating to child protection, equal opportunities, health, safety and security, confidentiality and data protection, reporting all concerns to an appropriate person
- All members of the IT team are expected to support and compliment the work of one another to ensure the efficient working of the school

- To liaise with the Headteachers and Office Managers to organise the schedule of works to minimise impact on educational delivery and to record the work undertaken
- Maintain high quality working relationships with staff that contribute to creating a productive and happy working environment
- To ensure compliance with the school's Health and safety policy and the current Health and Safety regulations
- The post holder will be expected to carry out all duties in the context of and in compliance with all Trust's policies and procedures and in compliance with our Equal Opportunities Policies and Code of Conduct.

Other duties

- Participate in training and other learning activities as required
- Attend and participate in regular meetings
- Contribute to the wider life of the school if required
- Perform all other reasonable requests from the Headteacher and Line Manager
- Respect confidentiality at all times.

Outcomes

Folio Education Trust teaching and non-teaching staff will work closely together across many different areas of the schools to ensure the best possible learning experiences for our students.

The Senior Finance Officer's role contributes towards the smooth and efficient running of the schools to support raising student motivation, aspiration and achievement, improving behaviour and contributing to a wide range of school objectives within the School Development Plans (SDP).

Alignment with our ethos and our core values is expected at all times.

Person Specification – Senior Finance Officer

Criteria	Essential	Desirable
Education & Qualifications:		
Educated up to A Level		X
English, Maths GCSE (or equivalent) at Grade C or above	X	
Relevant Accounting Qualification (AAT, ACCA, ACA)		X
Skills , Knowledge & Experience		
Good understanding of general accounting concepts	X	
Good understanding of Microsoft Excel and Microsoft Word	X	
Good understanding and previous experience with accounting software	X	
Previous experience with PS Financials		X
Have experience of working in an Education environment		X
Ability to travel using own transportation between the various Folio site schools. (Clean driving licence preferred.)		X
Personal Qualities		
Willing to undertake and commitment to continuing professional development		
Show an understanding of safeguarding responsibilities and the need to work within the School's Child Protection Policy		
Appreciation of the issues of confidentiality and adherence to data protection regulations		
Ability to form good working relationships with students, colleagues and work as part of a team		
Good oral and written communication skills will enable you to confidently deal with all levels of stakeholders and internal colleagues including 3rd party suppliers		
Excellent troubleshooting skills, backed by a clear, analytical approach to problem solving		
Good organisational and time management skills and the ability to work under pressure and independently, with a proven track record of balancing priorities and working to strict timescales to deliver results on time and to a high quality in a fast paced, constantly changing environment		
Innovative, adaptable and flexibility in working practices and the ability to handle various pressures and demands associated with working in a customer –focussed Finance support role.		
A high degree of professionalism in your approach to work and tasks set		
Present a good role model for students		
A good sense of humour		

Application Procedure

For enquires about the role please contact Aisling Hanly, ahanly@foliotrust.uk or Richard Baker rbaker@foliotrust.uk

Please complete the Trust's application form – available for download at <http://www.folio-education.co.uk/Current-Employment-Opportunities> and return to Jacqueline Baker, Trust HR Lead jbaker@foliotrust.uk

In compliance with Safer Recruitment Guidelines CVs will not be accepted.

Closing date: As advertised

Interviews: As advertised

Shortlisted candidates will be contacted with details of the interview process. If you have not heard from us within two weeks of submitting your form, please assume your application has been unsuccessful.

Safer Recruitment

Folio Education Trust is an equal opportunities employer and welcomes applications from all sectors of the community. We are committed to protecting our students and staff and therefore have a rigorous recruitment process which includes assessing candidates' suitability to work with children. All staff will be required to hold an enhanced DBS Disclosure.

Equal Opportunities

At Folio Education Trust we believe that all individuals are of equal value and we are committed to equal opportunities for all. All people who work and study in the school have the right to be respected and valued within a safe and secure environment and not to be discriminated against on the grounds of age, class, sex, race, disability, sexual orientation and religion or belief.

The Candidate Privacy Notice can be viewed on the website at:

<http://www.folio-education.co.uk/Current-Employment-Opportunities>

The schools within Folio Education Trust are committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment.

Appendix 1 FOLIO

Introduction to Folio schools from the Chief Executive Officer



Dear Candidate,

I am delighted that you are interested in joining the Finance team at Folio Education Trust and its constituent schools.

Our Multi Academy Trust (MAT) has two secondary and two primary schools, and currently supports approximately 2500 students and 250 staff. In the next five years, we intend to double the current numbers. Our Finance team will form part of a professional operation supporting current schools and within that expansion, broadening the reach of our shared services and ensuring that the service provision is something that new partners will want to join.

Over the past year this successful 4-school, cross-phase, multi-academy trust (MAT) in South London has been on an exciting journey including starting the building of a brand new secondary phase school in South Croydon, costing £35M and scheduled for completion during 2020.

We are committed to delivering educational provision and supporting the health and well-being of learners from Early Years through to the end of the Sixth Form, and as such require our learning environments to be fit for purpose and provide quality facilities.

If you have it in you to be entrepreneurial and use your qualifications, background and experience to contribute to Folio's aim to enhance the life chances of young people, then read on and we look forward to receiving your application.

Mr Jonathan Wilden

Chief Executive Officer
Folio Education Trust

Appendix 2 FOLIO Trust Schools

Name & acronym	Type of school Numbers	Brief outline of the school	Description of Facilities	Numbers of staff and pupils
Wallington County Grammar School WCGS	Secondary 11-18 Grammar, Selective boys school with mixed Sixth Form	Founded in 1927, graded 'outstanding' by Ofsted in January 2017, aims to blend best of tradition with innovation. High performing school.	Mix of character Edwardian buildings, modernised and refurbished, and state of the art facilities including Physics labs and Drama studio. All set in 9 acres of parkland with sports facilities and dedicated sports hall.	132 staff (63 teachers) 1,095 students
Park Hill Junior School PHJS	Junior 7-11 South Croydon 3 form entry	Opened in 1968, now a successful, oversubscribed Junior School, rated 'Good' by Ofsted, broad range of ethnicity among pupils.	Purpose built school with sports field, multi surface games area, trim trail etc. Major refurbishment completed recently and further project to come as part of PSBP expected in 2019/2020.	31 staff (20 teachers) 366 pupils
St Peter's Primary School SPSS	Primary 4-11 South Croydon 2 form entry	Opened in 1952. Co-headship in place, curriculum based on international model. Variety of ethnic backgrounds.	Mix of original and recently added accommodation in an urban site with several hard core play areas but limited green space.	73 staff (20 teachers) 415 pupils
Coombe Wood School CWS	Secondary 11-18 Comprehensive South Croydon	One cohort so far, curriculum is underpinned by Health Related Fitness core ethos and values.	Currently in temporary buildings with limited facilities. Brand new school buildings being constructed on 30 acre parkland site opening late 2020	<i>Currently</i> 39 staff (23 teachers) 360 students
Folio Education Trust Central Team	Central Team	Senior team, shared services including Finance, HR, IT, Marketing, some catering & sports partnership staff	Mostly based at WCGS but many work on a flexible basis across the locations.	30 staff (including the sports partnership)

There is a Central Team of Folio Trust employees, the majority of whom are currently based at WCGS but others are located across the schools and work on a hot desk arrangement. The expectation is that most staff will have a base in the final new building at Coombe Wood School towards the end of 2020.

The Trust was created through an academy conversion of Wallington County Grammar School and granted Single Academy Trust status in April 2011. As two primary schools were brought into the Trust in April 2017, this coincided with the change to Multi Academy Trust (MAT) status and the Trust sponsored the development of the new Free School, Coombe Wood School, which opened in temporary accommodation in September 2018. Building the £35m new building on the same site in South Croydon is underway and the expectation is that this will be ready for occupancy later during 2020.

Appendix 3

Folio Education Trust, Values and Aims

We believe that we are outstanding: not because we say it, but because we work hard at it. We are dedicated, committed and focused. We believe that every person will reach their personal best and overcome any challenge through a shared culture and ethos. We are dedicated to developing as successful individuals, creating a positive environment where all of us will learn. We never fail because we never give up. We believe in ourselves. We believe in each other.

Core Purpose – Why do we exist?

'Folio' comes from the Latin word 'folium' meaning 'leaf'. Its definition is linked to the way in which the pages of a manuscript or a book are arranged and presented to the reader. The Trust has chosen this name to represent the knowledge and understanding required by people to unlock their aspirations and reach their personal best. 'A book is a dream that you hold in your hand'. The Trust also uses the term 'Folio' to represent the growth of children into well-rounded and successful young adults.

Folio Education Trust Core Purpose – Why do we exist?

- To implement a child centred focus to ensure all decisions lead to the development of confident young people who have character.
- To change people's lives through exceptional and memorable experiences that ensure people discover and then reach their personal best and unlock improved life chances.
- To be an employer of choice and give staff the motivation to achieve job satisfaction and develop professionally through a talent management framework.
- To offer service provision that listens, understands and adjusts to the people that are being served.
- To develop a self-improving system between all academies within the Trust where collaboration occurs with the core purpose of raising standards.
- To explore beyond education to help remove barriers which prevent social inclusion.

Our future – what do we want to see in 10 years?

Our Multi Academy Trust will support academies that are the first choice of local families because of the 'gold standard' education that is provided. All academies within the Trust are pupil centred and this drives our decision making. Smiling faces are common place for pupils and staff as they are happy being part of the academy and part of a wider Trust community. Being educated as part of this Trust will mean something to not only the individual but also those who provide the next step of a young person's education, training or employment.

The service provision which helps drive the individual organisations within the Trust is focused on quality – listening, understanding and adjusting to meet the needs of those it is designed to serve. A main objective is to provide a system of self-challenge, self-improvement and collaboration with a shared passion to raise standards and allow all students to reach their personal best. No student or member of staff is neglected but inspired to develop improved life chances and live long and happy lives. As part of the collaboration between academies there is a desire to research pedagogy and the importance of Health and Well-Being to influence social change to remove the barriers which affect mental health and access to the opportunities for discovering and reaching personal best. Every person deserves the best and the Trust will do what it takes to deliver this while ensuring efficiencies and economies of scale which deliver outcomes beyond outstanding on a global scale.

Long term goal on a national scale

Contribute towards the changing face of British Education and be one of the top five performing Multi Academy Trusts in the country, designing and sharing academy improvement strategies.

Appendix 4

Folio Education Trust, Legal Framework

Members and MAT Trustees

The role of our five Members is to appoint a Board of Trustees to run the Academy Trust. The Board comprises eight people: 3 Appointed Trustees, 4 Academy Trustees (often deriving from the Local Advisory Boards according to required skill sets) and the CEO (Executive Head) acts as a Trustee. Their remit is:

- Create an ethos consistent with that of Folio Education Trust
- Provide excellent education and care in Trust schools
- Meet all financial and legal requirements

MAT Trustees will operate at a strategic level, operationally the Chief Executive Officer is supported by both the Chief Operating Officer and the Chief Finance Officer in managing a team of other professionals providing a central support team using both internal employees and external specialist advisors.

A number of other centralised Trust committees exist to handle Remuneration, Admissions, Appeals, Complaints, Disciplinary matters etc.

Local Governing Bodies

Within the Trust these are currently referred to as Local Advisory Boards and focus on the strategic oversight of the individual schools. Lead Advisors will play an essential role in supporting and challenging each individual school. They will focus on the following areas:

- Outcomes for Pupils (Standards)
- Quality of Teaching, Learning and Assessment (Standards)
- Personal Development, Behaviour and Welfare / SEND (Resources)
- Leadership & Management / Areas for Development (Both)
- Financial Management (Resources)
- Health & Safety including Educational Visits (Resources)
- SEND & Pupil Premium (Standards)

Company Secretary

The clerks and Company Secretary will ensure that good quality training is in place for all governors (including members of the LAB), catering for different backgrounds and experience of the various members. They will assist the Trust in preparing Schemes of Delegation to the various sub-Committees, policies and procedures, and ensure that Board and Committee papers are produced on time, and to a good standard.

Conflicts of interest

All governors will complete a register of financial and other relevant interests upon appointment. This will be reviewed annually and governors will be asked at every meeting to declare any interest they might have in specific agenda items. Any governor with a financial interest in any decision could not be party to the discussion and could not vote on that agenda item.