



Application Pack for the position of Finance Manager

Willow Learning Trust

Start date: As soon as possible



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LETTER TO CANDIDATES

March 2026

Dear Candidate

Thank you for your interest in this exciting opportunity to join our Trust.

Since its establishment in 2017, the Willow Learning Trust has developed into a thriving community comprising three schools across Sutton and Merton: Glenthorne High School, Aragon Primary School and Abbey Primary School, alongside our Outstanding SCITT (School-Centred Initial Teacher Training). We are united by a strong set of shared values and a commitment to excellence. Our Trustees, Governors and staff work closely together, and our Headteachers collaborate to create a supportive, forward-thinking environment in which both staff and students can flourish.

As a member of our Finance team, you would be joining a successful, effective and welcoming department, the team consists of six staff based at Abbey Primary School and one at Glenthorne High School. We are currently recruiting two Finance Managers, these vacancies have arisen due to one colleague retiring after 25 years of service and another to seek further opportunities. We hope you will consider applying, and should you do so, please indicate whether you have a preference for either of the available roles.

This pack includes the Job Description, Person Specification and full guidance on how to apply.

Thank you once again for considering the role of Finance Manager at Willow Learning Trust. We are delighted that you are exploring this opportunity and look forward to receiving your application.

Kind regards

Jan Mayoran
Director of Finance
Willow Learning Trust

JOB DESCRIPTION – TRUST FINANCE MANAGER

Location:	Abbey Primary School
Responsible to:	Director of Finance
Grade:	6/SO1 (18-25) (£35 320-£39 276 FTE)
Hours:	36 hours per week (Term Time plus 2 weeks in school holidays) Part-time may be considered for the successful candidate

Purpose of the Role

The Trust Finance Manager is responsible for delivering effective day-to-day financial administration across the Trust. The post holder will support the Director of Finance by ensuring compliance with the Academy Trust Handbook, Financial Procedures Manual, VAT regulations, and all statutory requirements. The role ensures accurate financial processing, robust financial reporting, and high standards of financial governance. The post holder will also deputise for the Director of Finance as required providing continuity of leadership and oversight.

Key Responsibilities

Financial Management

- Provide financial support to all Trust schools, ensuring deadlines and deliverables are met.
- Prepare Trust management accounts, ensuring accurate and consistent coding in line with the Trust's financial framework.
- Process bank reconciliations for Trust bank accounts, including cash flow and monthly balance sheet reconciliations ensuring accuracy, completeness, and prompt resolution of discrepancies.
- Ensure all income and expenditure is recorded accurately in PSF with correct nominal and account coding.
- Process BACS and Charge card, reconcile accounts, and monitor outstanding balances.
- Ensure SEN funding is invoiced and received promptly and provide reports to SEN Leads.
- Process monthly VAT Reclaim for the Trust in accordance with VAT rules and Trust Handbook
- Prepare and submit claims for capital bids/expenditure from the Local Authority or other government bodies.
- Provide monthly breakeven and financial performance reports to key stakeholders within the Trust
- Carry out month end and year end procedures, including accruals, prepayments, deferred income, and production of required reports or statistical returns.
- Ensure all cash receipts are processed and banked promptly, and that any funds relating to the Charity are accurately identified and transferred.
- Support the Director of Finance in preparing Annual Budgets, ensuring accuracy, completeness and alignment with strategic objectives.
- To assist the Director of Finance with Internal Audit and External Audit deliverables/ queries.
- Produce Trip Outturn reports following the completion of trips.
- Monitor the Trust Contracts & ensuring Value for money and contract reviews/ renewals are completed on a timely basis.

Payroll

- Support the Director of Finance in overseeing the Trust's payroll function.
- Responsible for processing and balancing the Trust payroll control account and posting Trust payroll journals. Investigate and resolve any discrepancies, providing timely feedback and necessary information to the Payroll Officer and the Director of Finance.

Team Support & Systems Use

- Provide leadership, guidance and support to Finance Officers, ensuring delivery of key outputs while developing team capability and promoting continuous improvement.
- Promote a culture of continuous improvement by reviewing financial processes, identifying efficiencies and implementing changes to enhance accuracy, timeliness and overall team performance.
- Use systems such as Excel, PowerPoint, and other standard software as required.

All Staff Responsibilities

- Work collaboratively with the immediate finance team and wider Trust colleagues.
- Promote and uphold the safeguarding and welfare of all young people.
- Comply with Trust policies, including safeguarding, child protection, health and safety, confidentiality, data protection, and security.
- Undertake any additional duties within the grade and scope of the post, with permanent changes incorporated into future updates of the job description.
- Ensure that value for money underpins all financial activities.
- Work at other Trust schools from time-to-time if required



JOB DESCRIPTION – GLENTHORNE HIGH SCHOOL, FINANCE MANAGER

Location:	Glenthorne High School
Responsible to:	Director of Finance
Grade:	6/SO1 (18-25) (£35 320-£39 276 FTE)
Hours:	36 hours per week (Term time plus 1 week during the school holidays) Part-time may be considered for the successful candidate

Purpose of the Role

The School Finance Manager is responsible for delivering effective day-to-day financial administration at Glenthorne High School. The post holder will support the Director of Finance and Glenthorne Headteacher by ensuring compliance with the Academy Trust Handbook, the Financial Procedures Manual, VAT regulations, and all statutory requirements. The role ensures accurate financial processing, robust financial reporting, and high standards of financial governance

Key Responsibilities

Financial Management

- Provide financial support to all Glenthorne school, ensuring deadlines and deliverables are met.
- Prepare Glenthorne monthly management accounts, Balance Sheet Reconciliation, ensuring accurate and consistent coding in line with the Trust's financial framework.
- Process bank reconciliations for GLE Bank accounts, ensuring accuracy, completeness, and prompt resolution of discrepancies.
- Prepare financial reports for the SCITT, payments and support the completion of annual returns.
- Process Glenthorne invoices, receipt payments, and ensure all expenditure is approved by budget holders.
- Process Glenthorne supplier payments via BACS, charge card and Paxton card; reconcile accounts and monitor outstanding balances.
- Ensure all income and expenditure is recorded accurately in PSF with correct nominal and account coding.
- Ensure all cash receipts are processed and banked promptly, and that any funds relating to the Charity are accurately identified and transferred.
- Ensure SEN funding is invoiced and received promptly and provide reports to SEN Leads.
- Prepare and submit claims for capital bids/expenditure from the Local Authority or other government bodies.
- Provide monthly breakeven and financial performance reports to key stakeholders.
- Support the Director of Finance in preparing annual budgets ensuring accuracy, completeness and alignment with strategic objectives.
- Carry out month end and yearend procedures, including accruals, prepayments, deferred income, and production of required reports or statistical returns.
- Manage financial administration relating to new students, school trips, workshops, and events using school systems.
- To assist with Internal Audit and External Audit deliverables/ queries.

- Produce Trip Outturn reports along with reconciliation of Trip card expenses following the completion of School Trip.

Income & Parent Liaison

- Liaise with parents regarding dinner money, monitor payments, and report outstanding debts to the Director of Finance.
- Update SIMS with Free School Meal information and process holiday voucher allocations.

Lettings & Additional Income

- Support the Lettings Manager with raising invoices and managing bookings for hired facilities.

Team Support & Systems Use

- Act as the senior financial lead in the absence of the Finance Director, ensuring continuity of financial oversight and decision-making
- Provide guidance and support to Finance Officers to ensure the team meets collective deliverables.
- Use systems such as Excel, PowerPoint, and other standard software as required.

Payroll

- Support the Director of Finance in overseeing the Trust’s payroll function.
- Responsible for processing and balancing the payroll control account and posting payroll journals.
- Process and approve Staff expense claims in line with Trust policy and procedures.

All Staff Responsibilities

- Work collaboratively with the immediate finance team and wider Trust colleagues.
- Promote and uphold the safeguarding and welfare of all young people.
- Comply with Trust policies, including safeguarding, child protection, health and safety, confidentiality, data protection, and security.
- Undertake any additional duties within the grade and scope of the post, with permanent changes incorporated into future updates of the job description.
- Ensure that value for money underpins all financial activities.
- Work at other Trust schools from time-to-time if required





PERSON SPECIFICATION

Essential Criteria	
Qualifications and Training	
Accountancy /Financial qualification ACA, CIMA, AAT or similar	A
Experience	
Experience in Budgeting and Forecasting.	A/I/T
Accounting & Financial experience of Purchase Ledger, General Ledger, Sales Ledger, Bank Reconciliations	A/I/T
Advanced experience working with and highly competent with spreadsheets and computerised accounting software in a commercial/ education environment	A/I/T
Experience of and willingness to cover multiple aspects of financial administration and analysis	A/I/T
Experience of finance analysis and reporting in a business environment	A/I/T
Skills and Qualities	
Honesty, integrity, drive and determination.	I
Aptitude and strong understanding of financial and IT systems.	A/I/T
Ability to lead, motivate & support colleagues	A/I
Quick and willing to acquire new knowledge/skills.	A/I
Ability to prioritise and meet strict deadlines.	A/I
Excellent communication skills both verbally and in writing with all stakeholders: staff,	A/I
Ability to set high standards for self and others.	A/I
Strong problem-solving skills	A/I
Ability to maintain and enhance effective systems for the smooth running of the school.	A/I
Ability to establish positive relationships with people at all levels.	A/I
Ability to maintain confidentiality.	A/I
Attitude	
Adaptable to deadlines and challenges	I
Initiative, flexibility, resilience and have a 'can-do' approach	I
Commitment to the aims of the Trust and to securing best value.	I
Ambition and enthusiasm for own career and the Trust.	I
Understanding of safeguarding responsibilities and the need to work within the school's child protection and safeguarding procedures.	A/I
Commitment to equal opportunities.	I
Willingness to participate in, and show a commitment to, own professional development.	A/I

Desirable Criteria	
Experienced in PS Financials	A
Experienced in payroll preparation.	A/I
Experience of working in an educational setting, showing the post-holder's ability to work effectively with teaching staff and to operate confidently and appropriately in a school environment.	A/I
Experience of supporting and advising budget holders in the management of budgets	A/I

Key: A = Application Form, I = Interview, T = Task

The Willow Learning Trust is an equal opportunities employer and welcomes applications from all the sectors of the community. We are committed to protecting our pupils and staff and therefore have a rigorous recruitment process which include assessing candidates suitability to work with children. Candidates will be shortlisted against the above essential criteria assessable from application forms. Issues relating to safeguarding and promoting the welfare of children will be explored during the interview process.



GUIDANCE TO APPLICANTS

Please read these carefully before making your application.

THE APPLICATION FORM

The application form will play a key part in whether you are called for an interview, so it is important that you take your time and complete it as fully and accurately as possible.

When selecting candidates for interview we have to base our decisions on the information you give us. The Person Specification is enclosed with this application form. This is a list of the skills, knowledge, qualifications, experience, aptitudes and abilities that are required to perform the job. When we read your application form we will be looking for evidence of examples which demonstrate how you meet the criteria in the person specification. You must include sufficient evidence and examples to show that you meet the requirements.

PERSONAL DETAILS

For monitoring purposes we would ask that you provide the information requested on the Equal Opportunities Monitoring Form at the back of the application form. This form is removed before shortlisting and will be destroyed after monitoring.

CAREER HISTORY

This is the record of your work history. It may include periods of unpaid or voluntary work as well as paid employment e.g. you may include time spent as a carer for one of your family or a voluntary helper in a school. Please account for any gaps in your employment history.

If the title of the position does not make it clear what work you did e.g. twilight crew, canvasser, please briefly describe the main duties.

You may continue on another sheet if you need extra space.

EDUCATION, QUALIFICATIONS, TRAINING

The Person Specification may ask for specific qualifications or training. You should list the relevant qualifications or courses undertaken. Where you have additional qualifications or training, mention these if they relate to your knowledge or skills. Proof of qualifications will be required at interview.

STATEMENT OF SUITABILITY

This section is your opportunity to show us that you meet the Person Specification. Take each criterion of the Person Specification and tell us the details of your knowledge and experiences. Give specific examples of things you have done which demonstrate your ability.

When reading your application, we cannot assume that because you have experience you also have the ability to carry out a task and vice versa. You may have experience of managing staff, but we need to know how you motivated your staff. We don't expect you to have formal experience, but if you can show that you have the ability to do the component tasks, that will be equally acceptable e.g. to organise a meeting you need to be able to: liaise with others, book accommodation, organise refreshments, and compile agendas.

You may already have prepared a CV and want to send that instead of answering the Statement of Suitability. You may send it, but you must also complete the Statement of Suitability. CVs often list the jobs

you have had and their responsibilities, but they often do not properly describe your skills and abilities. It is unlikely that we will be able to find enough evidence in a CV alone.

You may use examples and evidence from outside paid employment. You may use examples from voluntary work or your hobbies or interests.

REFEREES

If you are offered the job, the offer will be made subject to receipt of satisfactory references, pre-employment medical clearance, an enhanced DBS disclosure and, for teaching staff, a check on your teaching qualification status. If your referees do not confirm what you have told us, we may want to discuss this with you. We will ask you to complete an online Medical Questionnaire which will be sent to our Occupational Health Department. It is their job to make sure that you are fit to do the job we have offered you. In some instances, you may be asked to go for a medical examination. You will also be asked to supply evidence of any qualifications that are required. All employees are required to have DBS clearance. Unless you have a clearance issued within three months of being appointed, and have had no break in employment, we will require a new check to be carried out.

ONLINE CHECKS

We will undertake a number of online checks prior to confirmation of employment as a part of our pre-employment checks for the successful employee.

RELATIONSHIPS

We do not have a policy of excluding people who are related to school staff, Trustees or Governors, but if you are related to someone we will make sure that they are not involved in the selection process for this post. If we find out after you have been appointed that you are related to someone who interviewed you, we may dismiss you. 'Related' includes co-habiting with someone.

INTERVIEWS

Willow Learning Trust has a policy of using a wide range of selection methods to assess whether people meet the criteria. All teaching staff will be asked to take a lesson but you may also be asked to take an ability test, do a presentation or other work related exercise. You will be advised of any method being used for the post when called for interview. At the interview, you will be asked questions related to your Personal Statement as well as issues relating to safeguarding and promoting the welfare of children. Any issues of concern arising from a reference will also be explored during the interview process.

COMPLAINTS

The school is keen to ensure equality of opportunity in its recruitment and selection process. If you think that you have been discriminated against during the selection process on the grounds of your race, age, gender, marital status, caring responsibilities, gender re-assignment, sexual orientation, social class, religion, belief or disability you may make a complaint and we will investigate. If you feel you have been unfairly treated you must contact the CEO, in writing, within 3 working days of being rejected after an interview. You should explain the reason for your complaint to the Headteacher, or his/her representative. The CEO, or his/her representative, may want to talk to you before confirming the outcome of the investigation.

DATES FOR YOUR DIARY

The deadline for applications: **Midnight, 15th April 2026**

Interviews: **21st April 2026**





The Willow LEARNING TRUST

KEY BENEFITS



PROFESSIONAL DEVELOPMENT

- Comprehensive programme of professional development for teaching and non-teaching staff
- A long and successful track record of supporting teachers from ITT, through ECT and into leadership roles
- Bespoke ECT programme
- Collaborative opportunities to work on innovation and in partnerships across the Trust
- Apprenticeships opportunities to support the development of staff new to role

WELLBEING

- 24/7 Employee assistance programme
- 50% discount on Benenden healthcare
- Opportunities for flexible working
- Hybrid working available for suitable posts
- PPA time that can be worked from home (Primary Schools only)
- Protected 'gained time' for planning (Secondary School)
- Wellbeing activities and initiatives suggested by staff



FINANCIAL

- National pay and conditions for teachers and support staff
- Recruitment and retention allowances
- Generous pension schemes
- Salary sacrifice schemes including: Cycle to work and Electric vehicles, legacy childcare vouchers
- Long service awards