The Bridge Trust

Make a difference to the lives of children and young people every day

Trust Finance Manager

Information & Person Specification

Pride Passion Partnership Professionalism Positivity

"We are a family. There is so much teamwork and collaboration - each person has got something to bring."

Staff Member

The Bridge Trust

The Bridge Trust is an ambitious family of schools which embraces the individuality of everyone, both children and adults.

We are committed to get learning right and we're always looking for new and better ways of doing things.

Everything is about doing the best for our children and young people.

We place children and young people at the heart of everything we do.

We improve lives through innovative and integrated approaches.

Our five values – the 5 Ps underpin our work:

Positivity Passion Pride Partnership Professionalism

These values are central to the success of our family of schools.

Our family of schools

Presently The Bridge Trust oversees five schools in London, three special schools and two mainstream primary schools. It also operates a Training & Development Centre and an Outreach Service. The Trust also overseas two schools in Norfolk – The Bridge Easton in Norwich and Fen Rivers School in Kings Lynn.

The Bridge Trust Bridge School

The Bridge Trust Integrated Learning Space

The Bridge Trust Satellite School

The Bridge Trust Hungerford School

The Bridge Trust Pooles Park

The Bridge Trust Fen Rivers

The Bridge Trust Easton School

The Bridge School is a large special school which provides for pupils with severe learning difficulties and/or autism. It is based on two sites, a Primary site and a Secondary site. The Bridge School has been judged outstanding by Ofsted in its last three inspections. A key focus of the primary curriculum is to offer a wide range of educational experiences. The secondary curriculum focuses increasingly, as the pupils progress through the school, on preparation for life after school, looking at accreditation options, independence and belonging and contributing to the community.

We have always been committed to supporting staff and pupils in other schools and sharing the knowledge we have. It was a natural progression for the CEO/Executive Headteacher to become a National Leader of Education in 2009 and the school to become a Teaching School in 2011. This has enabled us to offer a wide variety of training opportunities to our own staff and staff from other schools, develop an initial teacher training programme through School Direct, support other schools who may be facing challenging circumstances through facilitating our staff and staff from other schools to provide advice and support, and to develop and promote research in our own school and across the network of schools we work with.

Through partnership with the Local Authority we provide advice and support to all the mainstream schools in the borough of Islington on addressing the needs of pupils with autism or severe learning difficulties. This support is provided by a highly respected, small dedicated team of professionals who aim to work with schools to pass on their knowledge and develop skills in school-based staff.

"This is an innovative school. We have new school buildings, sensory rooms, cutting edge technology...

Also practice is innovative. We try out new ideas and support each other"

Member of Staff at a Trust School

Positivity

Passion

Pride

Partnership

Professionalism

The leadership team of The Bridge recognised that there was a small group of pupils whose needs meant that they were often being placed in residential schools, many miles from their homes. We felt given the right approach we could meet the needs of these pupils. We used the opportunities provided by the opening of Free Schools to develop a new provision for pupils with extremely complex needs which often included sensory overload and behaviour which challenges. This school opened in January 2015 and is called The Bridge Integrated Learning Space (ILS). Staffing at The Bridge School is typically one member of staff to every two pupils, whereas at the ILS it is at least one member of staff per pupil. Each pupil is assigned to a class team, however many of them have individualised timetables. The focus of much of the work at the ILS is to support the pupils to feel safe in the school and community and to develop appropriate independence skills. This allows them to access other learning opportunities. In October 2017 Ofsted considered the school to be outstanding at its first inspection.

In September 2017 we opened our second Free School. This school is called The Satellite School and it provides for pupils with autism who benefit from access to a mainstream curriculum but are not able to access mainstream education. This school is based on four sites and each site is located adjacent to a mainstream school. This allows us to provide for the very special needs of these pupils whilst also accessing opportunities for inclusion. Three of these sites cater for primary age pupils, one for pupils in Key Stage 3.

In September 2017 The Bridge Trust was approved as a sponsor for Hungerford Primary School. The schools have a long standing relationship as The Bridge Primary School is next door to Hungerford Primary School. Hungerford School was placed in special measures by Ofsted. We have recruited new staff to the school and put in place the leadership and coaching structures and systems which work in all of our other schools. We recognise that our expertise is special schools, but it is also running outstanding schools. We are implementing what can be transferred to a primary setting at Hungerford and also making sure that we ensure access to primary expertise. We have done this through setting up a School Improvement Board which ensures support and advice from local head teachers, from community and independent schools, and the Local Authority school improvement service. We appreciate that the school has a journey to undertake but our intention is for this too to be an outstanding school.

The Bridge Trust is unique, but not only in the collection of provision we have. We also have a set of fundamental principles which drive and inform us.

We are driven by our values – the five Ps – pride, passion, professionalism, positivity and partnership. All decisions and developments are anchored on these values. When recruiting we look for staff who will buy into and uphold these values.

We put children at the heart of everything we do. Whenever looking at new ways of doing things we consider the impact this will have on the children. We believe in developing staff, not constraining them. Our staff are the greatest resource our pupils have. We recognise that there are no absolute answers in the best ways to educate our pupils so we look to encourage staff creativity. We want people to try new ways of working (within safe parameters). We give staff a framework to work within, but encourage appropriate risks to be taken.

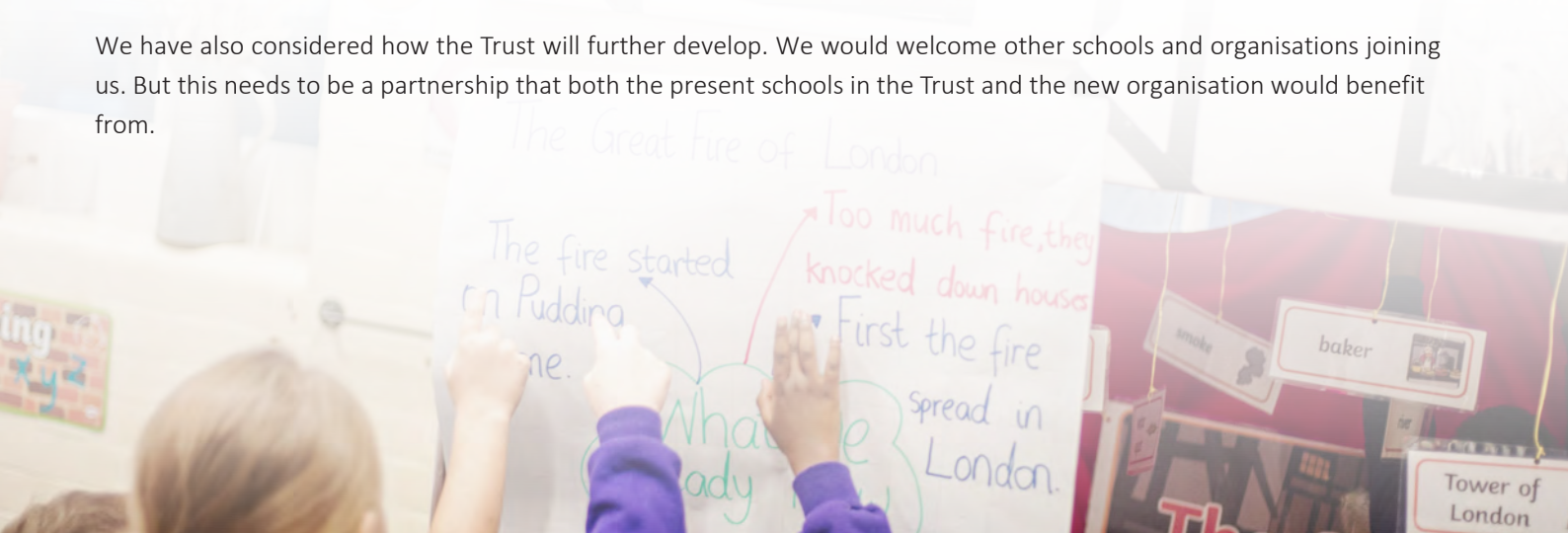
We want to learn from others and encourage staff to engage with the research literature. This is supported by our Training & Development Service. We also recognise that when working with the pupils in our schools it is not always about engagement with the evidence, but sometimes about informed creation of the evidence. Our research officer will support staff to create and share evidence using appropriate, well considered methodologies.

As a part of this commitment and desire to learning from others we actively engage in school improvement networks. The Trust is a part of Challenge Partners, a national school improvement network where schools support each other to improve. We lead a hub of over 30 special schools who network and learn from each other. We are also members of Maamulaha, a local network of schools, mostly mainstream. There is some overlap of these schools with our Teaching School Alliance (TSA) but there are other schools in the TSA who we also work with.

We have always been committed to engaging positively with our pupils and this is one of our values. We have recently worked with the British Institute of Learning Disability (BILD) and the Windesheim University of Applied Sciences, Amsterdam to introduce Positive Behaviour Support to all of our schools, mainstream and special. We are committed to working with all of our pupils with a positive focus.

What next? We do not stand still. We want to continue improving what we do, so that we can improve the offer to our pupils. We are not maverick in our approach to improvement, it is done in a considered way, but creativity and 'thinking outside the box' is encouraged. Each of our schools continually looks at how it can develop further. Being part of the Trust allows for learning across our schools and support to implement some new strategies. We definitely feel that 'together we are greater than the sum of our parts'. We learn from each other. We challenge each other. We support each other.

We have also considered how the Trust will further develop. We would welcome other schools and organisations joining us. But this needs to be a partnership that both the present schools in the Trust and the new organisation would benefit from.



Job Description

Post Title:	Trust Finance Manager
Location:	Central Team, The Bridge Trust (London)
Department:	Based at the Trust's Central Office with a requirement to undertake work at and for education provisions across the Trust.
Contract:	Permanent - Full time (35 hours a week); AYR
Responsible to:	Chief Operating Officer
Responsible for:	Finance team, central services, Headteachers and other staff

Core Purpose

The Bridge Trust are looking to recruit an experienced Finance Manager who will bring enthusiasm and drive to lead the development of the Trust finance operations through the next exciting stage of our growth.

Working with the Chief Operating Officer (COO), the Finance Manager will play a pivotal role within the central team of the Trust, overseeing a fully centralised finance function. This position is responsible for managing all financial operations across our seven schools from a centralised perspective, ensuring consistency and efficiency in financial practices. The Finance Manager will provide strategic financial guidance to the Trust's leadership team, ensuring compliance with financial regulations and standards. By leading the central finance team, the Finance Manager will foster a culture of continuous improvement and excellence. This role is crucial in managing the Trust's financial resources efficiently and effectively, supporting our mission of delivering exceptional education and fostering academic excellence.

Overall purposes inlude:

1. **Central Financial Oversight**: Manage and oversee all financial operations across the Trust's 10 schools from a centralised perspective.
2. **Strategic Financial Guidance:** Provide strategic financial advice to the Trust's leadership team to support decision-making and long-term planning.
3. **Compliance and Standards:** Ensure all financial activities comply with relevant regulations and standards, maintaining the Trust's financial integrity.
4. **Resource Management:** Efficiently manage the Trust's financial resources to ensure sustainability and support the Trust's educational mission.
5. **Team Leadership:** Lead and develop the central finance team, fostering a culture of continuous improvement and excellence.
6. **Financial Reporting**: Prepare and present accurate consolidated financial reports to the COO.
7. **Policy Development:** Support the development and implementation of financial policies and procedures to standardise practices across the Trust.
8. **Stakeholder Liaison:** Act as the primary point of contact for external auditors and other financial stakeholders.
9. **Cash Flow Management:** Monitor and manage cash flow to ensure the Trust's financial stability and operational efficiency.

Duties and responsibilities:

Leadership and Management

• To provide line management of central finance team to deliver a highly efficient centralised finance service for academies in the Trust. Conducting performance management, delegating work, and supporting development as required.

• To support the COO to provide high quality financial advice and guidance in the management of public funds, to the Trust and School leadership teams, ensuring compliance with Trust policies, financial regulations, and the Academies Handbook.

• In conjunction with the COO leading Budget Monitoring meetings with Headteachers and central budget holders to support financial management, support strategic financial planning and provide a high level of technical finance support.

Business Planning and Monitoring

• In conjunction with the COO Plan, prepare, and monitor, budgets for all schools.

• Work in liaison with School Senior Leadership colleagues and Trust central finance colleagues to set annual and revised School budgets using the Trust budget planning software, including funding, Top Up Income Schedules, employee and income and expenditure scenario planning.

• Assist budget holders with recovery plans in the case of overspends and financial development plans for growth.

• Prepare monthly consolidated budget forecasts and KPIs for review and monitoring by the COO.

Financial Management Accounting and Reporting

• Produce timely and accurate monthly School management accounts, including forecast outturn, cashflow and variance analysis commentary. Investigating variances and escalating issues identified as appropriate.

• Producing financial summaries, commentaries, and other related reports as required.

• Undertake accurate financial transactional processing to Trust monthly deadlines, including the preparation of required journals and balance sheet reconciliations to support the monthly management accounts.

• Ensure that month end journal adjustments (accruals, prepayments, deferred and accrued income) are processed in a timely and accurate manner.

• Ensure monthly balance sheet reconciliations are completed for COO review.

• Production of regular comprehensive management reports to ensure efficient and effective control of income and expenditure, complying with the Trust's financial regulations and public procurement regulations at all times.

• Monitor School capital expenditure and ensure that assets are accurately recorded and verified on a periodic basis in accordance with trust accounting policies and procedures. Maintain the Fixed Asset register and associated reporting in line with statutory accounts requirements.

• Prepare monthly, annual, and periodic financial returns to DfE and HMRC for the Trust and its Schools, as directed by the COO.

• Ensure the Trust remains compliant with VAT requirements. Assist the production of the group VAT return and control account reconciliation, ensuring submission in line with HMRC guidelines and those of the Trust.

• Overseeing the production of The Bridge Charity's monthly reserve statement by the Senior Finance Officer.

Payroll Operations

• Work closely with the Trust People Services Team to support the provision of an efficient and effective payroll service to all schools within the Trust, ensuring the employee budget scenario is up to date in the integrated budget planning system.

• Conduct a monthly reconciliation of payroll to the school budget, ensuring accuracy of all payments including NI, pension contributions, sick pay, maternity, and overtime payments, identifying any errors or omissions in line with the trust internal control framework, for approval by the COO.

• Assist with the required audits associated with payroll e.g., Teachers' Pension Scheme audit. Ensure that all internal and external payroll-related returns are made on time.

Treasury Management

- Support the COO with the cash management strategy. Produce monthly bank reconciliations and cash flow reporting.
- To check and authorise high value payment runs prior to COO authorisation.

Financial System Management

- Develop and improve finance systems and procedures across the Trust as required to meet business needs and support a robust internal control framework.
- Responsible for the maintenance of Trust Financial and Integrated Budget Planning System acting as a 'system administrator.'
- Support the onboarding system process of new Schools to Trust finance, budget, and compliance systems.

Audit & Compliance

- To prepare appropriate documents for the year-end file and consult with auditors as necessary, to support the COO in the production of the year end annual statutory accounts.
- Consult with both internal and external auditors regarding periodic and annual audits. Ensuring that records and reports are maintained to comply with audit policy and the Academies Handbook.
- Adhere to the period end and year-end financial closure deadlines.
- To support the COO on overseeing and ensuring the efficient implementation and administration of the Trust's approved insurance policies.
- Keep policies and practices under review to ensure the finance function complies with the Trust's Financial Procedures.
- Actively seek opportunities for cost improvements and ensure 'value for money' strategy is at the core of all financial activities within the Trust.
- Regularly monitor and manage the Trust's service level agreements with key School leaders to ensure value for money is achieved.
- To support the COO in overseeing and managing all procurement and tendering processes.
- To support the Schools in remaining compliant with Financial Procedures when conducting fundraising activities.

Other Specific Duties:

- To attend team meetings and maintain confidentiality inside and outside the workplace.
- To continue personal and professional development as required.
- To actively engage in the performance review process.
- To work in the best interests of the Trust, students, parents, and staff.
- To adhere to the Trust's policies and procedures with specific reference to Child Protection, Equal Opportunities, and Health and Safety.

Special conditions of employment

Rehabilitation of Offenders Act 1974

o This job is exempt under the Exceptions Orders to the Rehabilitation of Offenders Act 1974. Appointment to this job is subject to an enhanced DBS disclosure being obtained, and any relevant cautions, convictions, bind over orders and warnings being considered.

o If the jobholder is arrested, summonsed for an offence, or receives a conviction, a bind over order or a warning given by a police force, they are required to inform the Headteacher of this fact immediately. Such information will be treated in confidence, as this is consistent with the safety of children, compliance with statutory child protection procedures and the Academy's relevant policies. Failure to disclose such information may result in disciplinary action which could lead to the termination of the jobholder's employment.

Safeguarding and Promoting the Welfare of Children and Young People

o The jobholder is required to follow all of the Academy's policies and procedures in relation to safeguarding at all times, and to adhere to the statutory guidance 'Keeping Children Safe in Education'. The jobholder must take appropriate action in the event that they have concerns, or are made aware of the concerns of others, regarding the safety or wellbeing of children or young people.

Health and Safety

o The jobholder is required to exercise their duty of care by taking responsibility for their own health and safety, and the health and safety of other people who may be affected by their acts or failure to act. Full guidance regarding health and safety is set out in the Academy's Health and Safety Policy, and in any risk assessments relevant to the jobholder's role or circumstances. Both can be accessed via the jobholder's line manager, and the jobholder is required to comply with these and to use any protective clothing or equipment as instructed at all times.

Confidentiality and Data Protection

o The jobholder is expected to comply with the provisions of the Data Protection Act 2018 and the General Data Protection Regulation. Any information they have access to, or are responsible for, must be managed appropriately and any requirements for confidentiality and security observed. Information must not be disclosed to any person or Authority, for example a parent or the Police, without observing the correct procedure for disclosure as set out in the Academy's Data Protection Policy. Nothing shall prevent the jobholder from disclosing information that they are entitled to disclose under the Public Interest Disclosure Act 1998 as amended, provided that the disclosure is made in accordance with the provisions of that Act/s.

Equality and Diversity

o The Academy and the Trust are committed to equality and value diversity. As such the Academy and the Trust are committed to fulfilling their Equality Duty obligations and expect all employees to share this commitment. Duty requires the Academy and Trust to have due regard to the need to eliminate unlawful discrimination, harassment and victimisation, advance equality of opportunity and foster good relations between people who share characteristics, such as age, gender, race and faith, and people who do not share them. The jobholder is required to treat all people they encounter, with dignity and respect, and is entitled to expect this in return.

Training and Development

o The Academy has a shared responsibility with the jobholder for identifying and satisfying training and development needs. The jobholder is expected to actively contribute to their continuous professional development and learning, and to attend and participate in any training or development activities required to assist them in fulfilling their role and meeting their safeguarding and general obligations.

The Trust Operates a Strictly No Smoking or Vaping Policy

o This applies to all Academy premises and those where Academy services are provided.

The above-mentioned duties are neither exclusive nor exhaustive, duties and responsibilities of the post may change as requirements and circumstances change. The post holder will be required to carry out duties as requested by management that are broadly within the level of the post.

Person Specification

The successful candidate will meet the following person specification. Please note that the listed criteria will form the basis of the selection process. Applicants should address all elements of the Person Specification, indicating experience and where appropriate citing supporting examples within their application.

Education and Qualifications

- Qualified accountant (ICAEW, ACCA, CIPFA, ICAS, CIMA or Chartered Accountants Ireland) or equivalent
- Degree or equivalent
- Evidence of significant and relevant Continuing Professional Development (CPD)

Knowledge and Experience

- Successful experience of working in a school or School financial management role and managing school budgets.
- Experience of managing large and complex budgets.
- Experience of producing and presenting complex management accounts.
- Experience of successful bid writing or fundraising
- Evidence of significant and relevant Continuing Professional Development (CPD).
- Experience operating financial systems with an integrity e.g. fair-trade purchasing, supporting green issues.

Skills and Abilities

- Ability to prioritise, plan and organise with meticulous attention to detail
- Ability to manage time effectively, to meet deadlines and work under pressure
- Ability to take responsibility and work on own initiative
- Ability to procure contract services, evaluate performance and negotiate solutions with suppliers
- Excellent ICT skills with the capacity to learn to use new systems and software
- Excellent communication skills, both oral and written, including presentational skills
- Ability to form good working relationships both within the MAT and with external bodies and suppliers
- Demonstrate strong communication skills and the ability to build relationships with key stakeholders at all levels
- Ability to be discreet, discerning and maintain confidentiality, awareness of data protection issues
- Ability to process payroll and tax calculations
- Knowledge of education and / or the charity sector
- Proven line management experience
- Good knowledge and understanding of financial and operational management
- Managing systems to ensure that high quality financial & non-financial information is available to stakeholders
- Good working knowledge of MS Windows and Office Suite including MS Excel at an advanced level
- Experience of managing and consolidating large and complex budgets
- Experience of producing and presenting complex management accounts.
- Excellent financial management and financial planning skills
- Ability to introduce and maintain effective and robust financial systems

Personal Qualities and Commitment

- Reliable, respectful, responsible & conscientious approach
- Flexibility to deal with the diverse needs of the post including some travel across the Trust
- Establish and maintain appropriate professional relationships
- Able to always maintain Integrity and confidentiality
- High level of initiative and ability to work independently or as part of a team with a range of staff
- Sense of humour and equable temperament
- Able to remain calm and composed under pressure and work to deadlines
- Commitment to and understanding of equal opportunities and safeguarding
- Strategic and analytical thinking
- Organisational wide holistic approach
- A professional role model who is committed to their own professional development and to developing others

Equal Opportunities

- Commitment to implementing the school's Equal Opportunities Policy

www.thebridgetrust.academy

The Bridge MAT Limited

251 Hungerford Road

London

N7 9LD