

# Ivy Education Trust



Application Pack and Job Description  
Senior Finance Manager  
Ivy Education Trust



## Senior Finance Manager Ivy Education Trust

Ivy Education Trust is seeking to appoint an experienced Finance professional with ambition, enthusiasm and ability to play a key role within our Central Trust Finance team. This newly defined role will play a key part in the current and future developments of the recently expanded Trust.

This role will not only lead on the promotion and delivery of good financial management across the Trust, but will support the CFO to develop the processes and systems within the central and school based teams. The post holder will operationally manage the central finance team and work with the CFO to strategically review and assess the financial health of the organisation.

In June 2022, the Ivy Education Trust was formed from the merger of its two predecessor trusts Estuaries Multi Academy Trust and Osprey Learning Trust. We are an eight school cross phase multi academy trust serving pupils and families in Teignbridge stretching from the market town of Newton Abbot through the coastal town of Teignmouth along the South West coast to the seaside town of Dawlish. This partnership represents a truly exciting opportunity for our schools, our staff and our pupils. Two strong multi-academy trusts becoming even stronger by merging into one Trust with a united vision and ambition for delivering high quality education across the communities that we serve.

The Ivy Education Trust works closely with all schools within the Trust and beyond. The Ivy Education Trust celebrates the diversity of each of its schools and is founded upon the alignment of vision and values that we all commonly hold to secure the best outcomes for our pupils.

The name of our Trust is inspired by the story of Dr Ivy Williams. Born in Teignbridge (Newton Abbot), in 1877, she managed what we would wish for all the children and young people of Teignbridge and surrounding area that we serve in our schools by fulfilling her childhood dreams and ambitions.

On 10 May 1922 Dr Ivy Williams became the first woman to be called to the Bar (formally recognised as a qualified Barrister of Law) of England and Wales.

The story of Dr Ivy Williams reminds us of the famous quote from Michelangelo:

*"The greater danger for most of us lies not in setting our aim too high and falling short; but in setting our aim too low and achieving our mark."*

The Ivy Education Trust supports and challenges all members of our learning community to dream big, aim high, and achieve more than they ever thought was possible.

If you share these visions and aspirations, then we very much welcome your application for this post.

If you have any questions about this post or would like to arrange a visit, please contact Jon Newman, Chief Finance Officer on [jon.newman@ivyeducationtrust.co.uk](mailto:jon.newman@ivyeducationtrust.co.uk)

Application forms and further information are available from our website, [www.ivyeducationtrust.co.uk](http://www.ivyeducationtrust.co.uk) or via email to [people@ivyeducationtrust.co.uk](mailto:people@ivyeducationtrust.co.uk)

Completed application forms should be submitted before the closing date stated below.

**Closing date for applications is Monday 20<sup>th</sup> February 2023 at 12:00pm. Interviews will take place on Tuesday 28<sup>th</sup> February 2023.**

# Job Description

<b>Job Title:</b>	Senior Finance Manager
<b>Location:</b>	Ivy Education Trust, Teignmouth, TQ14 9HZ
<b>Responsible to:</b>	Chief Finance Officer
<b>Salary:</b>	Scale 9, Point Range 40-44 (£46,549 - £50,601 per annum)
<b>Working hours:</b>	37 hours per week, All year round
<b>Contract:</b>	Permanent
<b>Start Date:</b>	April 2023

## Key purpose of job:

- To lead the promotion and delivery by Ivy Education Trust of good financial management to support the CEO, CFO and the Trustees, in accordance with the Academy Trust Handbook to ensure regularity, propriety and value for money.

## Key duties & responsibilities of the post

1. Line Manage the Trust Finance Team, developing a high performing team, ensuring succession planning is in place at all levels.
2. Provide advice and guidance to all colleagues on all aspects of the Trust's financial operations.
3. Provide support to school staff, developing and equipping colleagues with resources required to deliver effective Trust finance functions.
4. Ensure the Trust financial systems and structures reflect the best practice.
5. In conjunction with the CFO prepare annual and medium term financial planning.
6. Keep abreast of all financial developments and practice across the industry to ensure compliance and best practice for the Trust.
7. Onboard new schools to the Trust in line with agreed timelines.
8. Contribute to the ethos, development and success of the Trust.
9. Be familiar with, fully support and reinforce the aims, ethos, policies and procedures of the Trust with other stakeholders where and when appropriate.

## Specific Duties

1. Ensure the financial and management accounting systems for the Trust are implemented effectively, up to date and support all accounting and reporting needs.
2. Work with the CFO to develop appropriate financial regulations and work with budget holders to ensure compliance.
3. Maintain systems, audit processes and procedures that ensure financial transactions are recorded and reported accurately and that all financial controls are operating effectively.
4. Provide support to ensure the Trust maintains an effective payroll system and function including compliance with all legislation.
5. Oversee the preparation of reports and returns as requested on payroll payments including PAYE, VAT, expense payments, national insurance, pensions and any other relevant payments.
6. To manage all aspects of VAT accounting and reporting.
7. Liaise with auditors and implement audit requirements and recommendations throughout the Trust.
8. Research and support funding bids to external bodies including government departments to maximise Trust resources.
9. Ensure effective liaison with internal and external partners regarding procurement, claims, correspondence and communication.
10. Support and review the Trust risk register in relation to financial risks.

11. Ensure all contracting and procurement activities are fully compliant and services ensure best value for money.
12. Support the preparation of the annual budget.
13. Preparation of monthly management accounts, forecasts and other financial and non-financial reports for the Trust alongside the CFO.
14. Oversee, monitor and support Project Leads with budgets and costs of any project work including capital projects alongside the CFO.
15. Provide support, guidance, challenge and information to budget holders within schools.
16. Onboard new schools into the Trust, supporting the due diligence, updating the Trust financial and management accounting systems, creating budgets, aligning contracts and providing financial training.

#### **Other Duties**

1. All staff must commit to Equal Opportunities and Anti-Discriminatory Practice.
2. The Trust operates a Smoke-Free Policy and the post-holder is prohibited from smoking in any of the Trust buildings, enclosed spaces within the curtilage of buildings, and Trust vehicles.
3. To support the achievement of the Trust's objectives by working proactively with colleagues on projects or activities outside direct area of responsibility as required
4. To conduct oneself in a manner befitting a member of staff at all times, ensuring behaviours that display positivity to others.
5. To make maximum use of opportunities to generate a culture of celebration and praise amongst the staff of the Trust.
6. To follow the Trust's ICT policy for safe use of ICT
7. To be aware of and assume the appropriate level of responsibility for safeguarding and promoting the welfare of children and to report any concerns in accordance with the Trust's safeguarding policies. We expect all staff to share this commitment and to undergo appropriate checks, including an enhanced DBS.
8. To place the safeguarding of all children within Trust Schools/Colleges as the highest priority
9. To comply with legislation, policies and procedures relating to confidentiality and data protection, reporting any concerns to the appropriate person
10. To work in compliance with the codes of conduct, regulations and policies of the Trust and its commitment to equal opportunities
11. To comply with the Trust's Health & Safety policy and statutory requirements
12. To undertake any other additional duties not detailed above as required and as specified in the college Teachers' Pay and Conditions document, as long as they are commensurate with the level of the job.

**This is not an exhaustive list of duties; they may be varied from time to time without changing the general character of the job or the level of responsibility. A high degree of flexibility and adaptability is an important element of this role.**

**This is a description of the role as it is now. We periodically examine employees' job descriptions and update them to ensure that they reflect the job as it is then being performed, or to incorporate any changes being proposed. We aim to reach agreement on reasonable changes, but if agreement is not possible, we reserve the right to insist on changes to your job description after consultation with you.**

# Person Specification

Criteria	Essential	Desirable	How Assessed
<b>Qualifications</b>			
5 GCSEs Grade A-C (of equivalent) to include Mathematics & English	√		Application Form; Interview
Use of a computerised accounting package	√		Application Form; Interview
Qualified or part Qualified ACA/ACCA/CIMA or equivalent	√		Application Form; Interview
<b>Experience</b>			
2 years + experience in a similar role	√		Application Form; Interview
Previous line management experience	√		Application Form; Interview
Working in a finance office environment	√		Application Form; Interview
Preparation of management accounts and forecasts	√		Application Form; Interview
Budget Preparation	√		Application Form; Interview
Use of computerised accounting packages	√		Application Form; Interview
Cash flow forecasting		√	Application Form; Interview
Preparing schedules for Year End Statutory Financial Statements		√	Application Form; Interview
Working in Education		√	Application Form; Interview
Experience of Local Government and Teachers' Pension Scheme		√	Application Form; Interview
Payroll administration		√	Application Form; Interview
VAT return preparation		√	Application Form; Interview
<b>Personal aptitudes, qualities and skills</b>			
Able to lead a team and adapt leadership style	√		Application form; Interview; References
Excellent communication skills, verbal and written	√		Application form; Interview; References
Strong financial analysis, reconciliation and reporting skills	√		Interview; References
Excellent organisation skills and strong attention to detail	√		Application form; Interview; References
IT literate	√		Application form; Interview; References
Very Competent Excel user	√		Interview; References
Disciplined and organised with the ability to work under pressure	√		Application form; Interview; References
Excellent mathematical skills	√		Application form; Interview; References

Be a person of integrity	√		Interview; References
Be able to maintain confidentiality	√		Interview; References
Be able to remain impartial	√		Interview; References
Have a flexible approach to working hours	√		Interview; References
Be sympathetic to needs of others	√		Interview; References
Have an openness to learning and change	√		Application form; Interview; References
Listen to, reflect and act on feedback	√		Interview; References
Have a positive attitude to personal development and training	√		Application form; Interview; References
Be able to confidently address groups of people and individuals	√		Interview; References
Understanding of safeguarding issues and promoting the welfare of children and young people	√		Interview
Suitability to work with children	√		Application form; Interview; References

Ivy Education Trust is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment. All employees are expected to undergo Disclosure and Barring and employment checks.