



“Being the best we can be”



Trust Finance Assistant – November 2021
Recruitment Information Pack



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Dear applicant,

Thank you for taking the time to consider the position of Coast and Vale Learning Trust's Finance Assistant. Working with our Finance Officer and Trust Finance Services Manager, and given the growth of our Trust, this is a developing role in which you will play a key role in providing a range of finance administrative and budget management support to our schools.

This is a role where you will deliver the day to day finance work in our schools. You will play a key support role within our finance system function so that we can maximise the educational opportunities for the students. It will involve working closely with finance colleagues within our schools and to do this well, you need to be a friendly, approachable character coupled with the focus and drive to ensure that school support structures are of the highest quality.

We are most interested in appointing the person with the right personal characteristics who can grow into the role. If you regard yourself as a dynamic, personable and hard-working character who welcomes change and the opportunity to make the role your own, we would welcome an application from you.

Moreover, if you wish to discuss the post in more detail, please contact Garry who will be able to organise a further chat and/or visit.

Yours faithfully

A handwritten signature in black ink that reads "Crosby". The signature is written in a cursive style with a long horizontal stroke at the end.

Brian Crosby

CEO of Coast and Vale Learning Trust

About the Trust

Coast and Vale Learning Trust is a growing family of schools based on the North Yorkshire Coast. We converted from our lead secondary school (Scalby School), welcomed Newby & Scalby Primary School in 2018 and in 2019 welcomed Friarage Community Primary as our first sponsored school. We welcomed Lady Lumley's School in 2021, and our ambition is to continue to welcome new schools into our Trust where we can add capacity, resources, improvement and make sure all our young people have access to the very best education.

We are growing organically and firmly building on the school improvement journeys of Scalby School, Newby & Scalby Primary and Friarage Primary. As a Trust we have added to our central team which includes our Chief Operating Officer, Trust Finance Services Manager and school improvement colleagues working within our lead schools.

Our Trust is currently based at Scalby School in Scarborough with both our founding secondary and primary schools being judged 'good' by Ofsted. Our success in making sure that our staff are our greatest resource, with ongoing investment into our teaching and support staff teams has placed us in a good position to meet current educational challenges.

Strategic Plan

Coast and Vale Learning Trust aims to improve education in the locality through establishing coherent and collaborative practice across schools and other educational institutions in the area.

In seeking to realise its mission statement and achieve its strategic objectives, the Coast and Vale Learning Trust board are committed to:

- The principle of meaningful educational partnership between primary and secondary schools.
- Expanding the number of schools in the MAT where this enhances the education of youngsters already under the care of the Trust and can realistically improve it in the joining school.
- Sustainable and measured growth as a Trust.
- Collaborative working with other stakeholders and institutions for the benefit of local youngsters whether they are in the Trust or not.

Our schools

Scalby School

Scalby School is a successful and popular 11-16 community school and in recent years it has become the school of choice in our local community. We were judged 'good' by Ofsted in 2019 and have repeatedly achieved results well above the national average over the last decade. Our P8 score has placed us in the top 10% of schools nationally. We are proud of our broad and balanced GCSE based curriculum.



We are:

- A 'Good' school in every area according to Ofsted in 2012 and in 2019.
- A school with a well above average Progress 8 score because our students exceed expectations.
- A school with a real focus on teaching and learning through our designated Teaching School status
- A leading school in the Scarborough and North Yorkshire area with a real focus on making sure all our staff develop professionally.
- A school where British values are at the heart of our curriculum – so that all our students leave school knowing how to conduct themselves in the wider world.

To learn more about us please visit - <http://www.scalbyschool.org.uk/>

Newby & Scalby Primary School

We are the school of choice in our community and we are within commutable distance of Whitby, Teeside, York and surrounding areas. Ofsted in 2018 judged us to be 'good' in all areas and as a school we are very much outward facing both in terms of teaching and learning, and in constantly thinking about how we can improve. As a result, our pupils achieve well. For example, in 2019, 84% of the year 6 cohort reached age related expectations in reading, writing and mathematics combined, compared to the national average of 65%.

NEWBY & SCALBY



Since our "good" Ofsted in 2018, we continue to build on our successes and we are a family and a team, where everyone is given the challenge and support to be the best they can possible be in a safe, welcoming and positive environment. Children and staff will work and play together developing skills

so that we all become ambitious and reflective lifelong learners as well as being respectful and respected members of the community.

To learn more please visit - [Newby and Scalby Primary School - Home \(coastandvale.academy\)](https://coastandvale.academy)

Friarage School

Friarage officially joined Coast and Vale Learning Trust in September 2019 as a sponsored school. We were placed in Special Measures in October 2018 though have moved a long way since then, especially since we started working with the Trust in April 2019. Friarage is now a pleasant, purposeful and well-ordered school, serving some of Scarborough's most vulnerable learners. It is a real place of community, now on a clear upward path towards improving outcomes for our learners.



For example, in 2019, 38% of our year 6 reached age related expectations in reading, writing and mathematics combined, which was 12% higher than 2018 and signified average overall progress for the cohort.

To learn more please visit - <https://friarageprimary.org.uk>



Application Process

The closing date for all applications is 12 noon **on Tuesday 2th November 2021**

Completed applications must be returned to Garry Morrison at
garry.morrison@northyorks.gov.uk

If you do not receive confirmation of receipt of your application within one working day please call Garry on 07814935700.

If you think you are the person for the job, please complete the application form outlining your skills and experiences according to the job description and person specification.

An email will be sent to shortlisted candidates with details of the interview process. If you have not heard from us within a week of the closing date please assume your application has been unsuccessful.

Queries

Visits are warmly welcome. Please contact Garry to arrange.



Job Description

POST: Finance Assistant	
GRADE: Grade F	
RESPONSIBLE TO: Finance Officer/Trust Financial Services Manager (TFSM)	
STAFF MANAGED: None	
POST REF:	
JOB PURPOSE: To assist the Finance Manager (FM) and TFSM to discharge the Trust's financial and related management duties under ESFA, by providing a full range of finance administrative and budget management support to the Trust and its schools, working under the immediate supervision of the Finance Officer.	
JOB CONTEXT: <p>The post is required to work with the finances of the Trust, maintain accurate records, and ensure timely payments. Working to support the senior members of the Finance Team to provide financial data and analysis to enable the Chief Executive Officer (CEO) and the Trustees to make effective resource deployment decisions</p> <p>This role is office based, but may require travel to and working at sites throughout the Trust.</p> <p>This Trust is committed to safeguarding and promoting the welfare of our pupils and young people. We have a robust Child Protection Policy and all staff will receive training relevant to their role at induction and throughout employment at the Trust. We expect all staff and volunteers to share this commitment. This post is subject to a satisfactory enhanced Disclosure and Barring Service criminal records check for work with children.</p>	
ACCOUNTABILITIES / MAIN RESPONSIBILITIES	
Operational Issues	<ul style="list-style-type: none">• To support the Finance Officer/Finance Manager /TFSM in the day to day operations of the department including purchase ledger, sales ledger and cashbook transactions• To ensure all relevant NYCC/ESFA finance paperwork is completed and returned by deadlines.• Input budget information into appropriate systems

	<ul style="list-style-type: none"> • To assist in the production of financial reports for the TFSM, detailing issues and recommendations • To support the TFSM in compiling statistics and monthly/annual returns, checking and analysing these return and raising any queries. • To support the Finance Officer to complete all Year End close down paperwork by the required deadlines. • To support the Finance Officer in preparing for Audit inspections • To support the Finance Officer in work with TFSM/COO on financial benchmarking, comparative statistical analysis and checks. • Undertake administrative duties as required • To ensure compliance with the Academy Trust Handbook & Trust Finance Policy
Communications	<ul style="list-style-type: none"> • Communicate effectively with staff, ESFA, Trustees, Governors and supplier/contractors under the direction of the Finance Officer. • Provide reports as requested to enable the TFSM to interpret the finance data and enable them to make effective resource deployment decisions • Advise other staff on financial procedures
Partnership Working	<ul style="list-style-type: none"> • Work with our educational or supplier partners to ensure compliance with financial procedures and regulations
Resource management	<ul style="list-style-type: none"> • To manage the counting and banking of school monies and issuing of relevant receipts. • To support the Finance Officer to generate monthly income and expenditure analysis. • To support the Finance Officer to manage the process of paying suppliers including reconciling orders, inputting invoices, cheque/BACs production and subsequent filing invoices. • To support the Finance Officer to manage the process of invoicing customers, including reconciling orders, collating the necessary paperwork and collecting and allocating the receipts to regular reconciling of the sales accounts. • To support the Finance Officer with processing school credit card transactions and other month end procedures/reconciliations. • Attend staff meetings and training days
Safeguarding	<ul style="list-style-type: none"> • Be responsible for promoting and safeguarding the welfare of children and young people that you

	come into contact with, by knowing who to report your concerns to.
Systems and Information	<ul style="list-style-type: none"> • To manage an organised and effective filing and record system ensuring that this is auditable if required. • Maintain the school's financial system's • Share information appropriately – in writing, by telephone, electronically and in person.
Data Protection	<ul style="list-style-type: none"> • To comply with the Trust's policies and supporting documentation in relation to Information Governance this includes Data Protection, Information Security and Confidentiality.
Health and Safety	<ul style="list-style-type: none"> • Be aware of and implement your health & safety responsibilities as an employee and where appropriate any additional specialist or managerial health & safety responsibilities as defined in the Health & Safety policy and procedure.
Equalities	<ul style="list-style-type: none"> • We aim to make sure that services are provided fairly to all sections of our community, and that all our existing and future employees have equal opportunities. • Ensure services are delivered in accordance with the aims of the equality Policy Statement. • Develop own and team members understanding of equality issues.
Flexibility	<ul style="list-style-type: none"> • <u>The Trust provides front line services, which recognises the need to respond flexibly to changing demands and circumstances. Whilst this job outline provides a summary of the post, this may need to be adapted or adjusted to meet changing circumstances. Such changes would be commensurate with the grading of the post and would be subject to consultation. All staff are required to comply with Trust's Policies and Procedures.</u>
Customer Service	<ul style="list-style-type: none"> • <u>The Trust requires a commitment to equity of access and outcomes, this will include due regard to equality, diversity, dignity, respect and human rights and working with others to keep vulnerable people safe from abuse and mistreatment.</u> • The Trust requires that staff offer the best level of service to their customers and behave in a way that gives them confidence. Customers will be treated as individuals, with respect for their diversity, culture and values.
Date of Issue:	October 2021

PERSON SPECIFICATION

JOB TITLE: Finance Assistant Grade F

Essential upon appointment	Desirable on appointment
Knowledge <ul style="list-style-type: none">• Knowledge of finances, including knowledge of accounting and financial procedures• Knowledge of administrative systems and IT packages, including Microsoft Office	<ul style="list-style-type: none">• Producing and managing budgets• Knowledge of Academy Trust Handbook
Experience <ul style="list-style-type: none">• Experience of working in a finance role including experience of monitoring budgets• Experience of using databases/Computerised accounts software• Experience of a purchase ledger function• Experience of a sales ledger function	<ul style="list-style-type: none">• Experience of working in a finance role in a school environment• Experience of internal auditing• Managing financial accounts using financial systems• Experience of working with spreadsheets
Occupational Skills <ul style="list-style-type: none">• Ability to manage an organised and effective record system• Analytical & problem solving skills• ICT skills• Ability to use the keyboard with speed and accuracy• Attention to detail, neatness and accuracy• Organisational and time management skills• Ability to work as part of a team• Confidentiality	<ul style="list-style-type: none">• Budget Management skills

<ul style="list-style-type: none"> • Good interpersonal skills • Ability to work without close supervision • Ability to present information in a logical, clear and concise format and communicate this effectively both verbally and in writing 	
<p>Qualifications</p> <ul style="list-style-type: none"> • Relevant Level 3 qualification to evidence good numeracy skills or experience within the finance sector at this level or above 	<ul style="list-style-type: none"> • NVQ with finance or AAT level qualification
<p>Other Requirements</p> <ul style="list-style-type: none"> • Enhanced DBS clearance • To be committed to the school's policies and ethos • To be committed to Continual Professional Development • Willingness to attend meetings in the evening, as required 	

NB – Assessment criteria for recruitment will be notified separately.

Optional - Statement for recruitment purposes: You should use this information to make the best of your application by identifying some specific pieces of work you may have undertaken in any of these areas. You will be tested in some or all of the skill specific areas over the course of the selection.