



# Finance Manager APPLICATION PACK



Dear Applicant,

Thank you for showing an interest in joining The Bolton Impact Trust.

Bolton Impact Trust Academies have been delivering high quality Alternative Provision and Special Education to students in Greater Manchester and Lancashire for over 20 years and we are proud of our track record of making a real difference to children's lives in our area.

Our aim is to inspire every young person to acquire the knowledge, skills and experience necessary, both inside and outside the traditional classroom environment, to fulfil their true potential. Developing self-esteem, confidence and resiliency are major goals for us and preparing our young people to enjoy worthwhile and fulfilling lives back in their own communities after attending the Impact Trust Academies is a crucial part of our work.

We think that our Trust is a very special place where we respect individuality, diversity and difference. Every child who joins us is afforded a fresh start and every adult who joins our team is given the opportunity to contribute. Staff Wellbeing is extremely important to us and we offer attractive support packages including Employee Assistance Programmes, Wellbeing Credits and enhanced CPD opportunities.

The Bolton Impact Trust is seeking to appoint a skilled and organised Trust Finance Manager to support the Trust in our next stage of growth. You will have experience of working in a finance driven environment and possess excellent people skills, attention to detail and risk awareness.

Yours faithfully

Paul Hodgkinson



CEO – Bolton Impact Trust

## WELL-BEING AT THE BOLTON IMPACT TRUST

The Bolton Impact Trust recognises that staff are our most important assets, and we wish to support them fully to thrive both personally and professionally. We recognise that there is a correlation between the wellbeing of our staff and the quality of provision that we offer to our students, so we wish to promote a consistent trust-wide approach to wellbeing for our staff. We want our staff to thrive, come to work happy and leave work happy.

Our whole Trust vision is for all staff to enjoy successes at work and to develop their experience and skills to become excellent at what they do. Our wellbeing mission and aims are built in culture rather than as a set of stand-alone wellbeing activities. We believe that wellbeing is a constant state of botheredness for all.

### Our wellbeing pledges

- We demonstrate compassionate leadership at all times
- We promote the concept of 'it's nice to be nice'
- We challenge any instances of non-compassionate leadership
- We create a constantly open 'support window' for staff
- We survey staff regularly
- We recognise outstanding staff performance regularly (praise culture)
- We offer high-quality CPD
- We consistently apply Trust policies
- We ensure that scrutiny leads to support, not judgement
- We look to create better environments for staff to work in
- We put resources aside for wellbeing activities
- We create Leadership Spaces for staff to work without external interference
- We provide opportunities for staff to collaborate with colleagues from across the trust and from external networks

### Some examples of wellbeing activities include:

- Workload reduction strategies being reviewed regularly
- Making adjustments to working conditions for staff when required
- Clear email expectations – we do not expect our staff to read or respond to emails outside of working hours unless they want to
- Providing free refreshments each day
- Access to 'wellbeing' credits which allows agreed time off work
- Access to free counselling and Occupational Health
- Access to free physiotherapy
- Providing pastoral drop-ins and confidential supervision sessions for staff
- Fresh water dispensers on all sites
- Providing creative opportunities for connecting with staff and promoting their wellbeing (e.g., breakfast meetings, shared lunches,)
- Employee Assistance programme
- Menopause support
- Men's Health promotions
- Extensive opportunities for staff development (CPD programme)
- Equality Champions
- Wellbeing Champions

## **ADVERT – FINANCE MANAGER**

We are looking for an experienced finance professional to make a significant impact by strengthening the Trust's finance function. The successful candidate will have the ability to demonstrate sound knowledge of accounting, financial planning and regulatory requirements. The Trust is looking for an enthusiastic, interpersonal and highly skilled individual to support the CFO in delivering the Trust's Financial Strategy.

### **Why you?**

- You are an experienced finance professional
- You have excellent communication skills
- You have experience of working within a multi academy trust
- You have a commitment to partnership working across our Academies and with external stakeholders

The successful candidate will bring innovative ideas and be confident in managing a range of Finance systems. This is a fantastic opportunity for an enthusiastic and diligent candidate who is keen to develop their skills in a successful Trust. We offer an outstanding opportunity for the right person to make a real impact on children's lives, and to develop their career. We hope that you will decide to pursue your application and that you will consider a future with us at the Bolton Impact Trust.

### **Why choose us?**

- At BIT we value all members of staff. We have a strong focus on staff wellbeing, providing access to wellbeing support services via a dedicated wellbeing charter
- We are a growing Multi Academy Trust (MAT)
- Staff receive guidance and support from an experienced executive leadership team who invest in the development of their teams and the Trust
- A wide range of CPD opportunities
- A Competitive salary
- Part of the Local Government Pension Scheme (LGPS)

**This role is full time and permanent**

To apply, please follow the link and complete an online application form. The link can be found on the vacancies page of our website.

<https://www.boltonimpacttrust.org.uk/join-us/vacancies>

Visits to the Trust are welcome by prior arrangement. Candidates should contact the Chief Finance Officer Miss Kate Connolly on 01204 471358 or email:

[ConnollyK@boltonimpacttrust.org.uk](mailto:ConnollyK@boltonimpacttrust.org.uk)

**Applications should be submitted by Sunday 14<sup>th</sup> April at 12pm to**

[ConnollyK@boltonimpacttrust.org.uk](mailto:ConnollyK@boltonimpacttrust.org.uk)

**Interviews will be held in the week commencing 22<sup>nd</sup> April**

Candidates should ensure that their referees are easily contactable, with the correct phone number and email address and able to reply promptly if references are requested.

#### **Rehabilitation of Offenders Act 1974**

All posts involving direct contact with children are exempt from the Rehabilitation of Offenders Act 1974. However, amendments to the Exceptions Order 1975 (2013 & 2020) provide that, certain spent convictions and cautions are 'protected'. These are not subject to disclosure to employers and cannot be taken into account. Guidance and criteria on the filtering of these cautions and convictions can be found on the Ministry of Justice website or see here.

It is an offence to apply for the role if an applicant is barred from engaging in regulated activity relevant to children (where the role involves this type of regulated activity)

Our academies safeguarding policies can be found on the safeguarding section of the trust website [www.boltonimpacttrust.org.uk](http://www.boltonimpacttrust.org.uk)

Shortlisted candidates will be asked to provide details of all unspent convictions and those that would not be filtered, prior to the date of the interview. You may be asked for further information about your criminal history during the recruitment process. Following shortlisting we will also undertake an online search on all applicants to confirm a candidate's eligibility, and to identify any potential safeguarding concerns or risks to the Trust's reputation. If your application is successful, this self-disclosure information will be checked against information from the Disclosure & Barring Service and overseas checks were applicable before your appointment is confirmed. Successful applicants will be subject to all necessary safeguarding checks as per Keeping Children Safe in Education.

**This post is subject to an enhanced DBS check**

***Bolton Impact Trust is committed to safeguarding and promoting the welfare of children, young people and vulnerable adults and expects all staff and volunteers to share this commitment and individually take responsibility for doing so.***

## JOB DESCRIPTION

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|---|---|
| <b>Job Title</b>  | Trust Finance Manager   |
| <b>Salary</b>   | Grade 11 (NJC Scale points 39 – 43)<br>£47,420 to £51,515   |
| <b>Location</b>   | Bolton Impact Trust Head Office<br>97-99 Chorley Street<br>Bolton<br>BL1 4AL<br>The post will be an agile post, based at the Trust office with home working. Travel to academies will be required as necessary. |
| <b>Hours of Work</b>  | 37hrs/week<br>All year round  |
| <b>Contract</b>   | Permanent   |
| <b>Responsible to</b>   | Chief Finance Officer   |
| <b>Job Purpose:</b><br>To work closely with the Chief Finance Officer in providing a responsive and professional Finance service to our academies within the Trust, providing oversight and day-to-day support on all finance matters. To ensure that the Trust remains compliant at all times with all relevant financial regulation.  |   |
| <b>Main Responsibilities:</b> <ul style="list-style-type: none"> <li>• To ensure all academy leaders and office supervisors comply with all internal and external financial regulations.</li> <li>• To lead on the production of budgets and medium-term forecasts, taking the lead role in developing, setting and monitoring in conjunction with individual academies and reporting to the CFO and SLT as appropriate.</li> <li>• Play a key role in the development of common financial processes across the Trust.</li> <li>• Provide a high-quality service to support the Trust's vision.</li> <li>• To work proactively and effectively with all budget holders and managers and other staff within the academies across the Trust, providing timely expert advice, guidance, support and training that supports the educational aims and ethos of the Trust</li> <li>• Ensuring academy leaders have the financial information necessary to ensure best value in meeting the objectives of the Trust.</li> <li>• Play a key role in the preparation of budgets and three-year financial forecasts as a part of the Trust's financial planning process.</li> <li>• Preparation of accurate and timely management accounts and forecasts.</li> <li>• The completion of statutory and non-statutory financial returns</li> <li>• Attendance at Trust committee meetings, and at other meetings as required to provide strategic information, guidance and advice on all financial matters related to the Trust.</li> <li>• The development, implementation, maintenance and improvement of robust financial policies, procedures and controls that satisfy statutory accounting and</li> </ul> |   |

audit requirements and ensure full compliance with the Academies Financial Handbook and ensuring that these are complied with throughout the Trust.

- To play a key role in devising and implementing appropriate accounting procedures to monitor and control academy expenditure, to assist Trust academies to maximise the use of their resources.
- To use financial management information, especially benchmarking, to identify areas of relative spend, assess trends and directly advise Academy Leads, SLT and CFO.
- Take a leading role in the development of financial systems and enhancements.
- Be the super user for the Trust Finance System
- To oversee the payroll function for the Trust, liaising with the Trust payroll provider to ensure the monthly payroll operates efficiently and effectively, and to ensure all payroll-related reports and returns are produced and submitted accurately and on time.
- To be responsible for ensuring all sales invoices are raised in a timely manner
- To monitor debtors and creditors
- To ensure all purchases follow appropriate competitive tendering/quotes as laid down in the Trust Procurement Policy.
- To ensure best value in the acquisition of all services and resources through effective procurement and contract management.
- Identify and inform Academy Leads, SLT and the CFO of the causes of significant variance and take prompt corrective action.
- To maximise income generation e.g. external grants, business, sponsorship, funding within the strategic objectives/ethos of the Trust, and act as point of contact for grant applications, gifts and other donations.
- To ensure accurate financial accounting records are maintained that meet both financial management and financial accounting requirements, including control and maintenance of the Trust chart of accounts.
- To ensure regular and timely reconciliation of all balance sheet control accounts.
- To liaise with external and internal auditors as appropriate and oversee implementation of any agreed recommendations.
- To monitor cash flow and raise awareness if spending needs to be controlled to remain within cash limits.
- Prepare monthly accounts and reconciliations necessary to support the monthly management accounts.
- Ensure that the Trust remains compliant with VAT requirements, including monitoring the Academy's VAT status and ensuring that VAT returns are submitted in line with HMRC guidelines and those of the Trust
- Ensure that the relevant accounting standards are appropriately applied in the production of the monthly and annual accounts;
- Lead on updating the Academy's fixed asset register, including additions, disposals, transfers and depreciation charges;
- Support the CFO in the coordination of the external and internal audit teams, ensuring that all work is undertaken in order to meet Governance and statutory requirements.

#### **Additional Responsibilities**

- The post holder will also carry out any other reasonable instructions relating to Finance support given by the Chief Finance Officer, or Chief Executive Officer in order to support the work of the Trust and its academies.
- This job description sets out current responsibilities of the post that may vary from time to time without changing the general character of the post or the level of responsibility entailed.

- Some of the above responsibilities may be achieved through effective delegation and supervision of the day-to-day tasks involved.
- Whilst every effort has been made to explain the main duties and responsibilities of the post, the list is not comprehensive.

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## PERSON SPECIFICATION

| Personal Attributes required<br>(based on the job description) | Essential<br>(E)<br><br>Or<br><br>Desirable<br>(D) | Identified by:<br><br>Application Form (AF),<br>Interview (I), Test (T) or<br>other |
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### QUALIFICATIONS AND TRAINING

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|---|---|----|
| Part-qualified or full qualified<br>(ACCA/CIMA/ACA/CIPFA) | E | AF |
| 5 GCSEs including Maths and English<br>Grade C or above   | E | AF |
| Other finance qualification e.g. AAT                      | D | AF |

### EXPERIENCE

|   |   |      |
|---|---|------|
| Financial management, managing budgets,<br>financial reporting, procurement and<br>management of fixed assets | E | AF/I |
| Relevant experience within a medium/large<br>organisation or school – minimum 4 years                         | E | AF/I |
| Experience of working in a leadership team<br>or an appetite to lead and develop your<br>own team             | D | AF/I |
| Management of staff teams, including<br>professional development and performance<br>management                | D | AF/I |
| Project management, planning, managing<br>and monitoring work   | D | AF/I |
| Developing effective financial administrative<br>systems and procedures                                       | D | AF/I |
| Supporting and advising senior leadership<br>within an organisation   | D | AF/I |

### KNOWLEDGE AND UNDERSTANDING

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|---|---|--------|
| A good knowledge of financial management<br>and accounting procedures               | E | AF/I/T |
| Comprehensive understanding and use of a<br>variety of financial management systems | E | AF/I   |

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| Knowledge of what constitutes 'best value' and the ability to translate this into all aspects of the job description | E | AF/I |
| Knowledge and understanding of personnel management  | E | AF/I |
| <b>SKILLS &amp; ABILITIES</b>  |   |      |
| Ability to deliver services and systems applicable for effective school management                                   | E | AF/I |
| Ability to devolve responsibilities, delegate tasks and monitor work   | E | AF/I |
| Excellent analytical skills, including use of Excel  | E | AF/I |
| Ability to maintain strict confidentiality and discretion at all times   | E | AF/I |
| Excellent organisational, planning and analytical skills   | E | AF/I |
| Ability to work under pressure and to strict deadlines   | E | AF/I |
| Ability to build and maintain effective working relationships with a wide variety of people                          | E | AF/I |
| Ability to manage people effectively to achieve an efficient and effective team of staff                             | D | AF/I |
| <b>PERSONAL ATTRIBUTES</b>   |   |      |
| Committed to the development and ethos of the Trust  | E | AF/I |
| Reliable, flexible and approachable  | E | AF/I |
| Committed to own professional development  | E | AF/I |
| <b>OTHER</b>   |   |      |

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| <b>Valuing Diversity</b> - Listen, support and monitor the diverse contributions made to service development without prejudice. Challenge behaviours and processes which do not positively advance the diversity agenda whilst being prepared to accept feedback about own behaviour. Recognise people's strengths, aspirations and abilities and help to develop their potential. Understand how Valuing Diversity can improve our ability to deliver better services and reduce disadvantage | E | AF/I  |
| <b>Developing Self and Others</b> - Ability to question and request appropriate training and development that links to the post, to seek opportunities that add to skills and knowledge, to respond positively to opportunities that arise. To support others' learning and share learning with others   | E | AF/I  |
| <b>Health and Safety</b> - The ability to identify risk to self and others when undertaking work activities and appropriate actions needed to minimise risk  | E | I     |
| Clearance through the Disclosure and Barring Service - (Clearance is required before confirmation of appointment)  | E | Other |