



# Exeter Learning Academy Trust

Creating our future together

## Finance Officer



Dear Applicant,

Thank you very much for your interest of the post of Finance Officer at Exeter Learning Academy Trust. This is an exciting post that will appeal to someone who enjoys all aspects of finance and would be happy working in different school settings. You will be joining a small team of finance officers who work closely together to support each other in their roles. We welcome applications from both experienced applicants and those who are keen to develop their careers – this could include supporting an individual who is working towards formal accountancy qualifications

Our Trust was formed in January 2017 and currently consists of 4 good/outstanding primary schools with approximately 1290 children and 205 staff. We are a people-focused organisation with strong principles of enabling every child and adult within our Trust to thrive. We have high aspirations for all our children, regardless of their starting point, and in turn, expect our staff to have high aspirations of themselves. We believe we have a duty to use our professional skills and knowledge to help the children overcome any barriers so they can be opened to a world of choice and opportunity.

Working collaboratively and developing strong relationships is core to the success of our Trust. We share our strengths and use our collective resources to get the best outcomes for our children. If successful, you will be joining a friendly, dedicated and hard working team of adults.

Our schools are all within 10 minutes of each other and situated in the vibrant city of Exeter which is easily accessible from the A38. Please contact Pauline Woodbridge at [pwoodbridge@elatschools.com](mailto:pwoodbridge@elatschools.com) if you would like to find out more about the post.

The closing date for completed application forms is 5pm on Wednesday 7th June 2023.

We hope that you are the kind of person who will enjoy working in this interesting and attractive City, with friendly staff and children. Thank you for your interest in the post and we look forward to receiving your completed application form.

Yours faithfully,



Rachel Shaw  
CEO

***The Local Governing Body and Trustees are committed to safeguarding and promoting the welfare of children and young people and Headteachers ensure that the highest priority is given to following guidance and regulations to safeguard children and young people. The successful candidate will be required to undergo an enhanced DBS.***

## About Exeter Learning Academy Trust (ELAT)

We are a family of primary schools situated on the west side of the River Exe. We have high ambitions for our schools and are driven in our mission to ensure that no child is left behind and all are given the opportunity to succeed. Whilst we choose to work closely and align best practice, we also protect the uniqueness of each school and ensure they maintain their identity in order to best serve their community. We value the relationships we can build both within and beyond our school gates and are passionate about our role in supporting the development of a fair and just society.

The Headteachers, CEO and CFO form the Academy Trust Leadership team. We have a central team of staff who run finance, premises and HR operations for school leaders.

The Trust is run by a board of Trustees, but each school also has a local governing body comprised of parent, staff and community representatives. Their role is to ensure the school provides a good quality of education to their pupils and provide challenge and support to the leadership.

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### Alphington Primary School

Alphington Primary has approximately 440 pupils aged 2-11. They have an over subscribed preschool, breakfast and afterschool club. The school has beautiful and extensive grounds including a large field and pond area, MUGA, forest school and indoor swimming pool. Ofsted Good – Nov 2019



### Bowhill Primary School

Bowhill Primary School has approximately 500 pupils aged 4-11. The school has a popular breakfast and afterschool club and the school building is used by many community groups in the evenings. The school grounds include MUGA, quadrants with outdoor musical instruments and sensory gardens and large playground spaces. Ofsted Good – Nov 2019

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### Ide Primary School

Ide Primary School has a preschool, breakfast and afterschool club and has approximately 140 pupils aged 2-11 years. The school serves the village of Ide and has a more rural location and is housed in a listed building. The grounds are extensive with a lovely school field, stage, MUGA, gardens and playground. Ofsted Outstanding – Nov 2011.



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### St Thomas Primary School

St Thomas Primary School sits within the heart of its community, surrounded by homes accommodating the families it serves. The local preschool, breakfast and afterschool club run out of a room adjacent to the school. The school has approximately 190 pupils aged 4-11 years. The school has an enclosed space for ball games, large playground and garden areas. Ofsted Good – Nov 2019.



## Our vision and values

After more than 18 months of educating children through a pandemic, and much uncertainty as to when it will end, we know that the world around us has changed dramatically. We have children in our schools who have yet to experience a normal school year without closure; staff who have been teaching almost 2 years and have not had their class full time in the classroom; parents who have had to become full time teachers; and our children exposed to an online world, increasing their vulnerability.

Recognising the impact the global pandemic has had, we revisited our vision and values throughout the Summer and Autumn of 2021 to ensure they would support and recognise the experiences children and adults have had. We consulted with our pupils, staff, governors and Trustees and took into account feedback from parents through surveys.

## Our vision

***Working together, we will provide an excellent education that enables all children to succeed and broaden their opportunities.***

## Our values

We have the **highest expectations** for every child and believe it is our job to ensure they have the opportunity to achieve their dreams and be the best they can be.

Building **strong relationships** are at the heart of what we do, and our children will know they are loved and have a role to play as future citizens in creating a fair and kind world.

Our staff team will be **successful and valued** in the workplace. They will strive to continuously get better and do their utmost to ensure all children reach their potential.

Our children will be immersed in a stimulating and **inclusive curriculum** that gives them the skills, knowledge and experiences they need to achieve well and become resilient learners.

Our schools will be **beacons in their communities** and reach out beyond the school gates to create positive relationships that will support our children's futures.



## About Exeter



Exeter is a vibrant city, full of historic buildings, cultural attractions and contemporary restaurants. The city has a real sense of individuality, its varied cultural scene is embraced by proud locals, and the diverse mix of eateries means it is renowned as one of the foodie capitals of the South West. Head to the West Quarter or the cobbled Gandy Street to discover a great mix of independent shops and boutiques, cafes and bars.

When it comes to culture, Exeter is renowned in the south west for its independent arts scene. It is also firmly on the map as a destination for top sporting events and music. A good mix of independent venues such as the Exeter Phoenix, and large venues such as nearby Powderham Castle play host to a packed calendar of events and festivals throughout the year.

Exeter's unique location also makes it ideal for pursuing many leisure activities including moor walking, mountain



biking, caving, rock climbing, white water kayaking and sea related sports/activities. Devon's many beautiful beaches and coastlines are just a short drive away.



With an airport and strong rail and road transport links, it is also a city that can open doors to many other places within the UK and further afield.



# Job Description

<b>Employer:</b>	<b>Exeter Learning Academy Trust</b>
<b>Location:</b>	<b>Based at one or multiple schools within the Trust.</b>
<b>Salary Grade:</b>	<b>E: £15.33—£16.93</b>
<b>Hours:</b>	<b>35 hours per week, 40 weeks per year</b>
<b>Title:</b>	<b>Finance Officer</b>
<b>Responsible to:</b>	<b>Chief Finance Officer</b>

This job description is not a comprehensive definition of the post. Discussions will take place on a regular basis to clarify individual responsibilities within the general framework and character of the post as identified below.

## Main Purpose of the job

- Provide support to the CFO in the day to day processing and monitoring of the school's finance and administration functions.
- Operate, maintain and develop the financial and administration procedures and systems in the schools.

*Staff must adhere to and ensure compliance with the relevant ELAT Child Protection Policy and Procedures at all times. If in the course of carrying out the duties of the role, staff identify any instance that a child is suffering or likely to suffer significant harm either at school or at home, they must report any concerns to the Designated Safeguarding Lead or to the Headteacher so that a referral can be made accordingly to the relevant third party services.*

## Responsibilities

1. Process the school's financial information in the ELAT Finance system, we currently use SIMS Finance.
2. Process the school's finances in accordance with the ELAT Financial Procedures and the Academy Trust Handbook.
3. Process and reconcile financial records e.g. purchase invoices, income, payroll, journals, a bank account, credit cards and petty cash.
4. To prepare and format reports for management accounts.
5. To monitor income and expenditure against budget.
6. Prepare estimates for annual forecasting.
7. To help prepare the annual budget with the CFO
8. To prepare estimates and costings for goods and services ensuring best value.
9. To record all recurring contracts.
10. To support the school administrators as directed by the CFO.
11. Oversee and be responsible for single central record and provide support for processing DBS checks.

## Responsibilities

12. To manage and maintain the school's online payment system currently School Gateway.
13. Run the School Pupil Census
14. Provide the information for statutory and non-statutory returns e.g. audit.
15. Support the school administration staff by having a broad knowledge and practical experience of finance and office administration.
16. Ensure internal policies, procedures, guidance and best practice are correctly implemented.
17. Ensure that health and safety and child protection regulations are observed at all times.
18. Adhere to all safeguarding procedures and policies.
19. Be part of a Central Finance team delivering accurate and consistent, support to schools.

## Links with other officers, Pupils, Service users or Members of the Public

1. Daily contact is made with the CFO around operation matters and the strategic development of Exeter Learning Academy Trust.
2. Regular contact with the Headteacher and senior teaching staff on school operational matters, primarily around the supply or gathering of information and including providing recommendations.
3. Frequent contact with the HR Manager, Estate and Compliance Officer and all Central staff. Contact with outside agencies, Devon County Council, and external providers regarding procurement.
4. To liaise with all appropriate agencies and external specialist staff.
5. Parental contact regarding financial matters.

## Central Team

1. Be an active contributor to the Central Team, including attending weekly meetings
2. As part of the Central Team, design, develop, review and implement financial and administration systems, including GDPR and Health and Safety across the Trust Schools.
3. Be able to advise, guide or make recommendations on complex programme/development issues affecting Trust schools, specifically concerned with long term planning, finance and allocation of resources.
4. Be able to correctly apply internal policies, procedures, guidance and best practice.
5. Provide support to other Central staff as directed by the CFO.
6. Process the Central Office finances as directed.

## Administrative Systems

1. Maintain, develop and ensure the security of the school's electronic systems and databases ensuring that information held is accurate and up to date.
2. Develop and maintain financial information and files in line with statutory requirements and according to best practice.



## Work Demands

1. The post holder will need: to be equipped to exercise considerable initiative with guidance in performing all duties of the post, seeking necessary advice where appropriate; deal effectively and calmly with emergencies, should they arise and apply a strong sense of vision and commitment to customer service provision and quality assurance.
2. The post is based in a busy office that is subject to constant interruption. It is critical that the post holder can prioritise their work effectively.
3. In addition to interruptions during school time, there is a need to adhere to numerous deadlines. There is an expectation that reports and returns will be delivered on time. These include monthly reconciliations, payments, reports, statistical returns and payroll documentation.
4. Requests for information are constant and need to be prioritised. Some deadlines and timescales are fixed corporately, so it is not always possible to negotiate a specified time so there are competing pressures.
5. This post is performed within an office environment. Occasional lifting of boxes is required.

**This role will require travel across the academies within Exeter Learning Academy Trust and therefore being able to drive is essential.**

## Equal Opportunities

- Have a statutory obligation to implement anti-discriminatory and equal opportunities when out their duties.

*At ELAT we expect staff to model the behaviours of a professional at all times.*



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## Person specification (all essential unless marked as desirable):

### Experience

- Substantial administrative skills within an educational background
- Substantial financial skills within an educational background
- Excellent task management skills for self and others – ability to meet tight deadlines
- Excellent IT skills including advanced knowledge of word processing, spreadsheet and presentation software packages, preferably Microsoft Word, Excel and PowerPoint
- Proven ability to manage own time effectively
- Experience of drafting documentation for the approval of others
- Ability to solve problems and implement effective procedures
- Ability to assimilate large amounts of disparate information and to analyse and make judgements on complex subject matters
- Ability to communicate clearly and use appropriate language both orally and in writing
- Experience of servicing committees and taking follow-up action
- Ability to build collaborative working relationships with peers and colleagues
- Proven ability to apply tact and diplomacy and good interpersonal skills, dealing with staff at all levels
- Proven ability to work to competing deadlines, prioritise appropriately and maintain a positive working attitude
- Flexible, positive and creative approach to work and meticulous attention to detail
- Previous work in Primary schools **(Desirable)**
- Experience with challenging and vulnerable clientele **(Desirable)**

### Strategic Thinking

- Problem solver, strategic thinker and planner
- Ability to provide strategic financial advice to others

### Education and Training

- GCSE English and Maths at Grade c or above or equivalent
- Financial qualification **(Desirable)**
- Business Administration qualification **(Desirable)**

### Equal Opportunities

- Staff have a Statutory obligation to implement anti-discriminatory and equal opportunities when carrying out their duties.

## The Application Process

### Application forms:

Application forms and the recruitment pack are available from the Trust website. Please send completed applications to [jobs@elatschools.com](mailto:jobs@elatschools.com)

### Visits:

Visits to our Trust are welcomed. Please contact Pauline Woodbridge at [pwoodbridge@elatschools.com](mailto:pwoodbridge@elatschools.com) to discuss the job in more detail or to organise a visit.

### Closing Date:

Please send completed applications directly to [jobs@elatschools.com](mailto:jobs@elatschools.com) by **9.00am on Monday 13th January 2025**. Applications received after this time will not be considered.

### Shortlisted candidates invited for interview:

Shortlisted candidates will be invited to interview on **Wednesday 21st January 2025**. References will be taken up and proof of identity, birth certificate and qualifications will be required at interview.

## Contact


Exeter Learning Academy Trust

c/o Bowhill Primary School


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 [www.exeterlearningacademytrust.co.uk](http://www.exeterlearningacademytrust.co.uk)