



# Recruitment Pack

**Vacancy:**

**Trust Finance Manager**

Polaris Multi Academy Trust,  
Field Top Road,  
Rastrick, Brighouse,  
West Yorkshire, HD6 3XB.

National Support School  
designated by  
  
National College for  
Teaching & Leadership

  
*Polaris*  
Multi-Academy Trust



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*I believe that our greatest strength is the integrity and passion of all our staff.*

Steve Evans  
CEO Polaris Multi-Academy Trust

# WELCOME

## *Welcome to the Polaris Multi-Academy Trust*

*The Polaris MAT is committed to recruiting staff who are passionate about providing every child and young person the opportunities and experiences, that gives them the confidence and aspiration to reach and go beyond their potential.*

The communities we serve have individual identities which reflect our vision for celebrating the uniqueness of each school. Our schools have the autonomy to learn, explore and develop their practice, led by committed and highly skilled Heads of School. Alongside this autonomy, our schools are committed to collaboration and the sharing of resources and best practice.

Our values are centred on building teams of highly skilled staff, through an unwavering focus on the development of skills, knowledge and understanding. We are passionate about delivering the very highest standards of training and continued professional development (CPD).

Our growing Trust is made up of both primary and secondary schools. Each school has its own unique DNA and individual identity, which is used as a platform to build on the enjoyment and academic success of the children in our care.



**Steve Evans**  
CEO Polaris Multi-Academy Trust

# VISIONS & VALUES

## *Our Vision*

- To provide every child and young person in the Multi-Academy Trust opportunities and experiences, which give all of them the confidence and aspiration to reach and go beyond their potential.
- To support and nurture each school's individual identity, to ensure that their unique DNA is used as a platform to build on the enjoyment and academic success of the children in our care.

## *Our Values*

- We instil the very highest expectations of everyone in the Multi-Academy Trust.
- We will ensure every school provides a safe, supportive and challenging environment to the children and young people in our care.
- We will ensure that every school is supportive and challenges all staff to continually improve their craft, through high quality professional development and opportunities for progression.

## *Our Aims*

- To remove the barriers faced by students in achieving challenging and aspirational academic targets through delivering the highest quality teaching and pastoral support.
- To collaborate with and grow expertise of staff across the MAT, to embed a sustainable self-improving system, that is built on strong leadership and succession planning.
- To provide a sustainable financial platform for schools in the trust through ethical financial controls which in turn, deliver high quality delivery of educational services.

# THE POLARIS FAMILY

*Schools within the Polaris Multi-Academy Trust*



Field Lane Primary



Rastrick  
High School



# THE POLARIS FAMILY

*Our schools are located across West Yorkshire.*

Staff from across the Trust can share expertise, practice, and resources because of the close proximity of each of our schools. Our schools are accessible from Junctions 24 and 25 of the M62, and is just 25 minutes from Leeds and 35 minutes from Manchester.





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*We have a happy workplace. The group of staff have moulded together well and we have fun while we are here.*

Carole - Payroll Manager

# Careers at Polaris

## *What's it like to work for our Trust?*

Our Trust has a reputation as an outstanding employer. This great reputation is built on the culture of support we offer our team. We have an outstanding induction programme, that will ensure that you make a great start to your career with us.

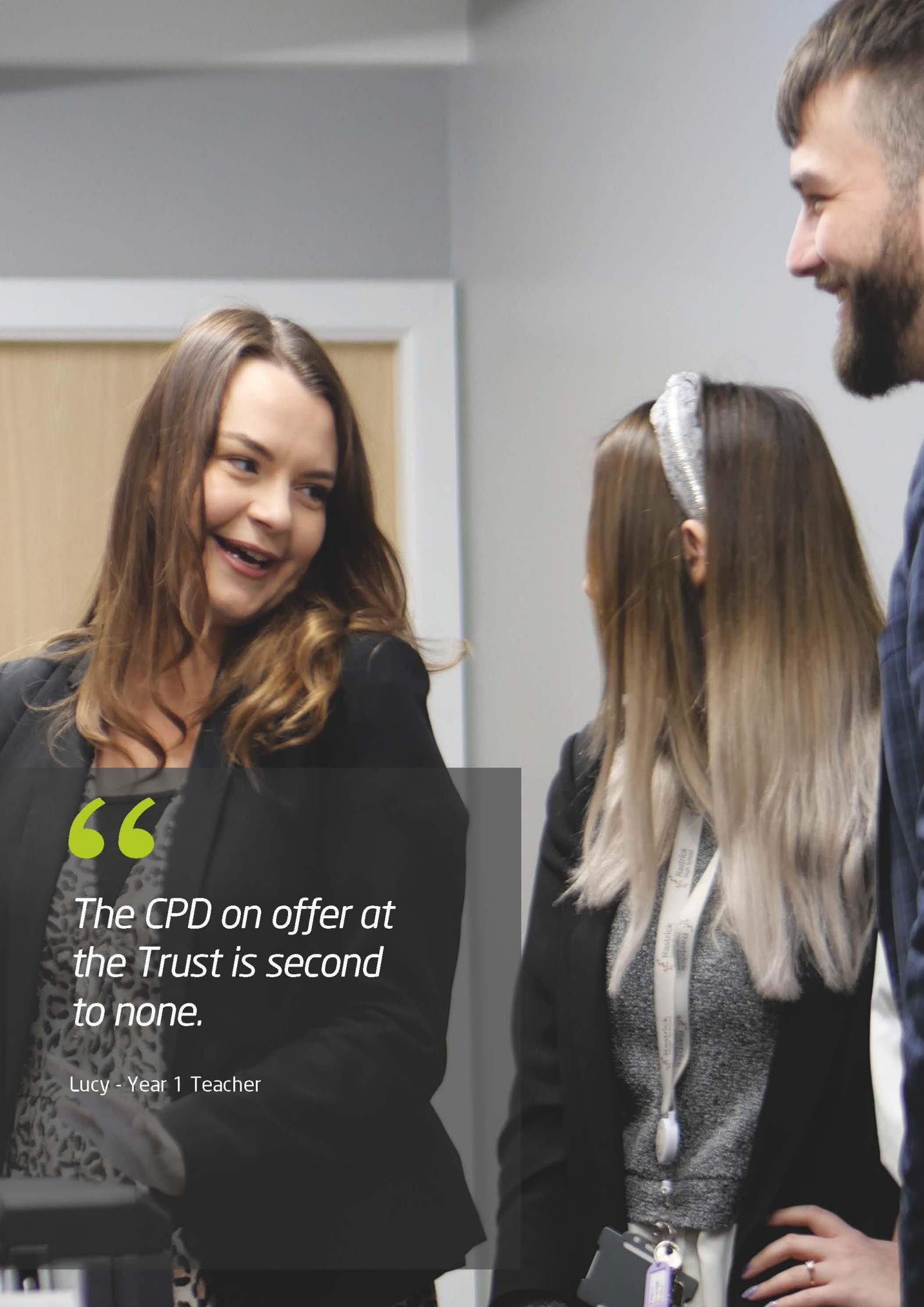
As well as the training highlighted above, our Trust offers apprenticeships in a wide range of areas of the business, from Site and Facility roles to Administration and Finance.

We work closely with Teaching School Hubs and other Initial Teacher Training providers to enable staff to train to teach. We always promote and provide opportunities for our staff to work together and collaborate. This commitment comes from our belief that we can all benefit from each other's experience and expertise, in turn this team approach helps ensure that you feel listened to, valued and supported.

We pride ourselves on staff wellbeing being at the centre of Trust and our School Leaders decision making, this why we work hard to ensure that staff know they are appreciated and rewarded for the excellent work they do.







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*The CPD on offer at the Trust is second to none.*

Lucy - Year 1 Teacher

# Careers & Wellbeing

## *What's it like to work for our Trust?*

The Trust Central Team supports our schools and employees through the running of a high-quality services, designed to deliver you important information to your fingertips. This includes integrated payroll that enables you to view and store all your salary documents digitally on your phone. The Trust's HR support dovetails with this easy to reach approach, ensuring that if/when you need more advice and guidance, it's there for you when you need it.

The communities we serve have individual identities which reflect our vision for celebrating the uniqueness of each school in our Trust. Our schools have the autonomy to learn, explore and develop their practice, led by committed and highly skilled Heads of School. Alongside this autonomy, our schools are committed to collaboration and the sharing of resources and best practice.

The Polaris Multi Academy Trust is committed to recruiting staff who are passionate about providing every child and young person the opportunities and experiences, that gives our children and young people the skills, knowledge and confidence to reach and go beyond their potential.





# *Our benefits*

*and why they matter*

# BENEFITS

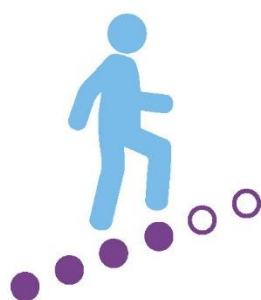
The Polaris Multi-Academy Trust is a great place to work and we really hope you'll agree. In addition to your competitive salary and a talented team of colleagues to work alongside, we offer a wide range of benefits to save you money, keep you healthy and help you enjoy your time at work. You'll also find plenty of opportunities to develop and progress your career at the Polaris MAT. We strive to develop and promote our own. We encourage professional development and promote internal growth, but not just upwards. We want you to have the chances to move into broader roles across our Trust and into different areas.

## *Professional Development opportunities*

We offer regular training and access to a range of internal and external programmes tailored to your learning throughout your career, including NPQs and other professionally accredited qualifications. There are opportunities for career progression with your home school or in other schools across the Trust as well as opportunities to move from our support team to a teaching role.



**Professional Development Opportunities**



**Opportunities for Progression**



**Performance Management Process**

# BENEFITS

## *Financial*

We offer a competitive salary for both teaching and support staff, whereby pay progression is possible on an annual basis.

Access to and auto enrolment into a highly attractive pension plan for all staff.



**Pension**



**Competitive Salary**

## *Wellbeing*

A generous holiday allowance for support staff and all our school calendars are designed to fit well with the 1265hrs allowance for teachers.

Training day events specifically designed to support staff wellbeing.

Staff feedback events designed to enable you to share how we can be even better at what we do.

Access to the cycle to work scheme.



**Wellbeing**



**Flexible Working**

# BENEFITS

## *Facilities*

We have great school buildings with well-maintained and modern facilities.

On-site catering with great food, reasonably priced for staff.

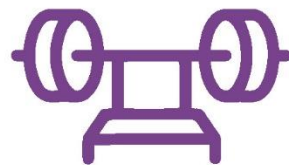
Free car parking at every school.

Access to the fantastic Rastrick High School gym on weeknights.

Preferential access and a discounted rate to the outstanding Smarties Nursery based in Rastrick.



Discounted Nursery



On-site Gym



On-site Nursery



On-site Catering



Modern Facilities

# Job Description

<b>Job Title</b>	<b>Trust Finance Manager</b>
<b>Reporting To</b>	<b>CFO</b>
<b>Scale / Salary Range / Contract</b>	<b>NJC Point 29 - 35 (£37,336 - £43,421) AYR 37 hours per week.</b>
<b>Responsible For</b>	<b>Trust Finance Officers</b>

## Core Purpose

To support the Chief Finance Officer (CFO) in the provision of an effective and efficient centralised finance service for the Polaris Multi Academy Trust.

Act as a finance partner to a designated hub of academies to provide financial management and support. To be responsible for the financial management and operation of accounting and budgeting systems for the academy hub, monitoring and reporting on their financial performance.

To ensure academies have access to timely and accurate management information, preparing monthly management accounts, commentary, and budget forecasts in line with the trust financial reporting cycle.

To deliver high quality, efficient financial advice, reports and information to the trust executive team, trustees, governors, senior leaders, and other trust colleagues.

To support the day-to-day financial management of the Trust, ensuring compliance with financial regulations, trust procedures and the Academy Trust Handbook.

To line manage a central team of Finance Officers and provide financial leadership support and guidance to Academies in the Trust.

## Key Accountabilities (and specific duties/responsibilities):

### Leadership and Management

- To provide line management of a team of Trust Finance Officers to deliver a highly efficient centralised finance service for academies in the Polaris Trust. Conducting performance management, delegating work, and supporting development as required.
- To support the CFO to provide high quality financial advice and guidance in the management of public funds, to the Trust and Academy leadership teams, ensuring compliance with Trust policies, financial regulation and the Academy Trust Handbook.
- Act as a finance partner for a number of academies, leading finance meetings with Heads of School to support academy financial management, support strategic financial planning and provide a high level of technical finance support.

# Job Description

## Business Planning and Monitoring

- Plan, prepare, and monitor, budgets for a designated hub of academies as determined by the CFO, and assist with management of other trust academies as and when required.
- Work in liaison with Academy Senior Leadership colleagues and Trust central finance colleagues to set annual and revised Academy budgets using the Trust budget planning software, including funding, employee and income and expenditure scenario planning.
- Manage and ensure compliance with systems to monitor budgets in relation to overspends and the scheme of delegation.
- Support the CFO in preparing monthly consolidated budget forecasts and KPIs for review and monitoring.

## Financial Management Accounting and Reporting

- Produce timely and accurate monthly academy management accounts, including forecast outturn, cashflow and variance analysis commentary. Investigating variances and escalating issues identified as appropriate.
- To produce financial summaries, commentaries, and other related reports for presentation to Local Governing Bodies (LGBs) 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.
- 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 academy 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 ESFA and HMRC for the Trust and its academies, as directed by the CFO.
- 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.
- Deliver financial accounting and budget management for the Trust subsidiary Ltd company; Smarties Nursery, located across various Trust academies.



# Job Description

## Payroll Operations

- Work closely with the Trust HR Manager and Payroll Manger to support the provision of an efficient and effective payroll service to all academies within the Trust, ensuring the employee budget scenario is up to date in the integrated budget and payroll system.
- Carry out a monthly reconciliation of payroll to the academy 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 CFO.
- 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 CFO with the cash management strategy. Produce monthly bank reconciliations and cash flow reporting.
- To check and authorise high value payment runs prior to CFO/CEO 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/Payroll System acting as a 'system administrator'.
- Support the system onboarding process of new academy locations to Trust finance, budget, payroll and compliance systems.

## Audit & Compliance

- To prepare appropriate documents for the year end file and liaise with auditors as necessary, to support the CFO in the production of the year end annual statutory accounts.
- Liaise 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 Trust Handbook.
- Adhere to the period end and year end financial closure deadlines.
- To support the CFO 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 Academy Trust Handbook.

# Job Description

## Procurement and Fund Raising

- 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 academy leaders to ensure value for money is achieved.
- To support the CFO in overseeing and managing all procurement and tendering processes.
- To support the CFO in being proactive in seeking, generating, and administering new sources of revenue for the Trust and academies.

## Other Specific Duties:

- The Central Finance team are located on site at the Polaris Multi Academy Trust Offices. There will be a requirement for multi-site working, at Academy level, based on the needs of the Trust and requirements of the role.
- To attend team meetings and staff 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.
- All support staff may be used to perform appropriate duties as and when required by the Trust, commensurate with the salary grade of that post if it is higher than the employee's current salary.
- To work in the best interests of the Trust, students, parents and staff.
- To adhere to the Trust's policies and procedures with particular reference to Child Protection, Equal Opportunities, Teaching and Learning and Health and Safety.

Whilst every effort has been made to explain the main duties and responsibilities of the post, each individual task undertaken may not be identified. Employees will be expected to comply with any reasonable request from a manager to undertake work of a similar level that is not specified in this job description.

This job description is current at the date shown, but, in consultation with you, may be changed by the Trust to reflect or anticipate changes in the job commensurate with the grade and job title and/or Trust.

# Job Description

## PERSON SPECIFICATION

Job Title: Trust Finance Manager		
KEY CRITERIA	ESSENTIAL	DESIRABLE
<b>Qualifications</b>	<ul style="list-style-type: none"> <li>A minimum of 5 GCSE's Grade A-C or equivalent including English and Maths.</li> <li>Part or fully qualified accountant (CIPFA/ACCA/ACA/CIMA) – or fully qualified AAT (demonstration of relevant equivalent experience may be considered)</li> </ul>	<ul style="list-style-type: none"> <li>School business management qualification</li> </ul>
<b>Experience</b>	<ul style="list-style-type: none"> <li>At least 3 years' experience in a senior finance role.</li> <li>Proven financial management experience from a commercial or educational environment.</li> <li>Significant experience of finance analysis and reporting</li> <li>Managing and reporting on budgets of significant financial value</li> <li>Experience of line management of finance staff</li> <li>Significant experience of accounting and payroll software eg PS Financials, Edupay.</li> </ul>	<ul style="list-style-type: none"> <li>Experience of working in a finance role in the education sector</li> <li>Budget planning experience</li> <li>Experience of budget software eg. Orovia BPS</li> </ul>
<b>Knowledge &amp; Understanding</b>	<ul style="list-style-type: none"> <li>Strong understanding of accounting policies, practices and procedures for financial management</li> <li>Working knowledge and understanding of the payroll function</li> <li>An understanding of the principals of efficient and effective financial control.</li> <li>Sound working knowledge of Ledger accounting and reconciliations</li> </ul>	<ul style="list-style-type: none"> <li>Practical knowledge of VAT regulations</li> <li>Demonstrable understanding of how to achieve best value for money</li> </ul>
<b>Skills &amp; abilities</b>	<ul style="list-style-type: none"> <li>Able to manage and prioritise workload to meet tight deadlines</li> <li>Ability to understand, interpret and communicate financial information</li> <li>Strong IT skills including Excel, MS Office and word processing</li> <li>Ability to communicate and negotiate effectively to a range of audiences (internal and external) through highly developed inter-personal, written, oral and presentation skills</li> <li>Work effectively as a member of a team.</li> <li>Demonstrate sound judgement with the ability to present solutions.</li> </ul>	<ul style="list-style-type: none"> <li>Purchase ordering software experience</li> <li>Payment portal experience (ParentMail, ParentPay)</li> </ul>

# Job Description

<b>Personal Qualities</b>	<ul style="list-style-type: none"><li>• An excellent record of attendance and punctuality</li><li>• Seek advice and support when necessary</li><li>• A commitment to confidentiality</li><li>• Determination to succeed and the highest possible expectations of self and others</li><li>• Reliability, integrity and stamina</li><li>• Resilience and perspective</li></ul>	<ul style="list-style-type: none"><li>• A commitment to inclusive education</li></ul>
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