

Finance Support Officer

Recruitment Information Pack

May 2024



Closing date: 8.00am on Monday 3rd June 2024

Interview date: Wednesday 5th June 2024

Start date: As soon as possible

Salary: BDO11 - BDO17
(£25,979 - £28,770 per annum - FTE)
(£23,329 - £25,835 per annum - Actual)
(Pay award pending 1/4/24)

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Welcome to Bradford Diocesan Academies Trust

Dear Candidate,

Thank you for taking your time to download our information pack and expressing your interest in the post of **Finance Support Officer** at Bradford Diocesan Academies Trust (BDAT).

This pack has been developed to provide you with a summary of all the information you need to consider when applying for a job within BDAT.

Within the pack you will find a job description, a person specification, a brief summary on the Trust and details of how to apply for this post should you choose to make an application.

You can of course find further information about us:

- on our website at www.bdat-academies.org
- on twitter at [#wearebdat](https://twitter.com/wearebdat)
- or by contacting us direct at emma.williamson@bdat-academies.org
- or calling [01274 909 120](tel:01274909120).

We wish you every success with your application and we look forward to meeting you in the near future.



Carol Dewhurst
Chief Executive Officer, BDAT

About BDAT

General Information and Background

Bradford Diocesan Academies Trust (BDAT) is a Multi-Academy Trust (MAT) supporting 19 schools in Bradford. We are a Trust which prides our self in delivering great education outcomes and life opportunities for all our children. We are an inclusive Trust working with children from a rich range of backgrounds who reflect our communities and the city we serve. We are proud to be all about Bradford and developing the future generation of lifelong learners who will go on to achieve incredible things.

BDAT is a Trust which recognises each of our schools is unique. We actively encourage and celebrate difference as we know each of our schools serves very different communities. However we also know that a key strength of being part of a Trust means together our schools can support each other, learn from each other and share great practice. As importantly we know from working our way through the COVID pandemic, that a problem shared really can be a problem halved, and by working together we can save ourselves time, money and lots of duplication of work.

We are a Trust which is value-led, and we know it is important that we consistently live these values. The Trust's mission is **"At BDAT we want every child to have a happy and high-quality education enabling them to grow and flourish during their time at school."**

Our core Trust values are **inclusion, compassion, aspiration, resilience, excellence (I.C.A.R.E.)**. We seek to model these values in all we do, including how we recruit and develop our staff, how we teach our students and how we liaise with our families, friends and partners. We are a proudly Christian organisation committed to providing high-quality education for all within our ethos. Whilst robust Christian principles underpin the work of the Trust, everyone is encouraged to explore their own spirituality and to recognise and understand that of others. We describe ourselves as having inclusive values believing these are as appropriate and important to staff and students of all faiths (and to those without faith) as they are to those who practice within the Church of England. It is for this reason we choose to support and sponsor Non-Church of England Academies, as well as those within the faith. Therefore, we welcome applications for this role from employees of all faiths as long as they understand and can promote the values which we share.

BDAT is a large Trust, however we pride ourselves in knowing and understanding our schools. We are all part of the BDAT family, and we all have the same motivation – to see our children succeed. For more information about us follow us on twitter @WeAreBDAT or visit www.bdat-academies.org

BDAT's Mission, Vision and Values

Our mission:

"At BDAT we want every child to have a happy and high-quality education enabling them to grow and flourish during their time at school."

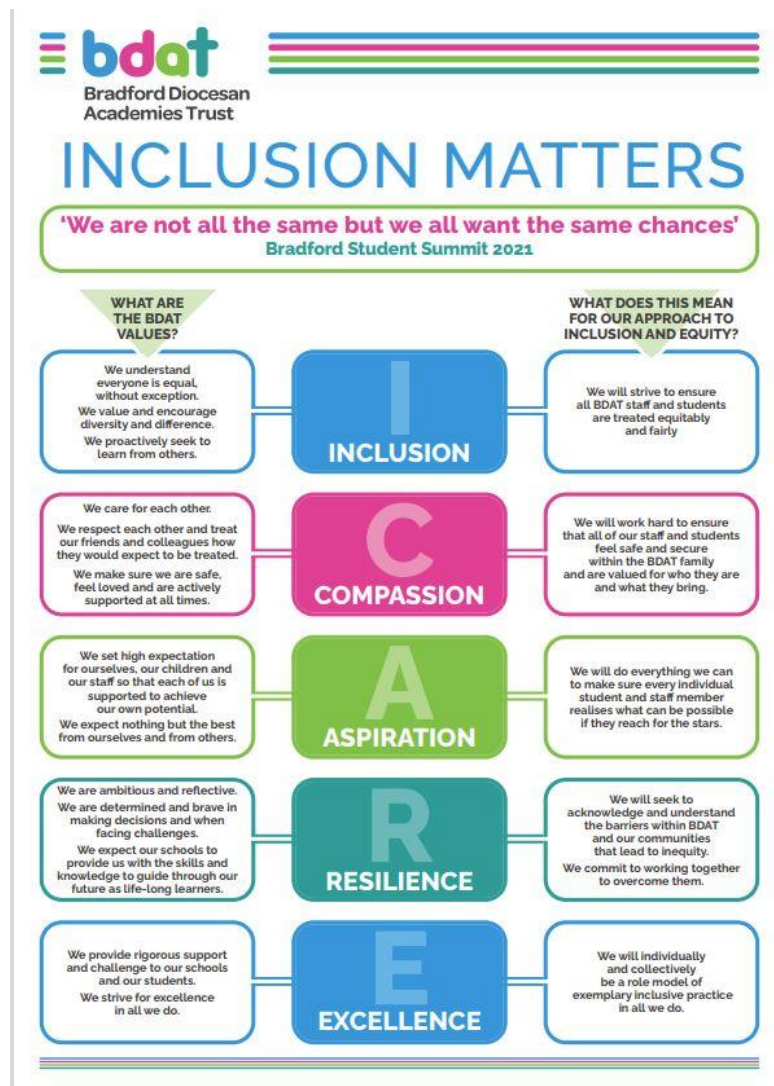
Our vision is:

"We will provide schools that develop student competence, confidence and character, driven by local community context and inclusive Christian values, ensuring every student achieves their academic potential and leaves our Trust prepared for the next stage of their life journey."

We want BDAT schools to be schools of choice for the diverse and special communities we serve.

We will recruit develop and retain highly skilled staff dedicated to making sure our children and young people have every chance to succeed."

Our values are:



Advertisement

Finance Support Officer

2nd Floor, Jade Building, Albion Mills, Albion Road, Bradford, BD10 9TQ

37 hours per week TTO + 2 weeks

(Flexible hours will be considered)

Start Date: June 2024

Salary: BDO11 - BDO17

(£25,979 - £28,770 per annum - FTE)

(£23,329 - £25,835 per annum - Actual)

(pay award pending 1/4/24)

Bradford Diocesan Academies Trust (BDAT) is looking to appoint a Finance Support Officer to provide finance support to the Trust's central finance team, in their day-to-day activities, including working with and in our Academies.

Line management will be through the Finance Manager, although some task management may be via the CEO and CFO.

The successful candidate will require strong finance, organisational and communication skills and be able to prioritise their workload. Ideally holding a qualification in bookkeeping/AAT, however the opportunity to undertake an AAT apprenticeship may be available for the right candidate. A knowledge of PS Financials would be desirable; however training will be provided. Strong IT skills and the use of Microsoft Excel are essential for the role. Your work will include the processing of financial transactions, such as raising purchase orders, sales invoices and posting purchase invoices, together with an element of accounting, including assisting the Finance Manager with month-end processes, preparation of management accounts and budget setting.

The post holder will act as an ambassador for the Trust, liaising regularly with a number of key internal and external stakeholders, and therefore discretion and diplomacy will be required.

Hours of work are flexible to meet the needs of the MAT, Trust and post holder, but will not routinely exceed 37 hours per week. Occasional evening work may be required to support Trust activities.

If you are interested in applying, full details, application form with information pack, can be found here: www.bdat-academies.org/vacancies.

Closing date: 8.00am on Monday 3rd June 2024

Shortlisting: Monday 3rd June 2024

Interviews: Wednesday 5th June 2024

Finance Support Officer Job Description

Bradford Diocesan Academies Trust (BDAT) is looking to recruit a Finance Support Officer (FSO) to support the work of the Multi-Academy Trust (MAT) and the Academies within the MAT.

Hours of work are flexible to meet the needs of the MAT. Occasional late afternoon or evening work may be required to support Trust activities.

Reporting to	Chief Financial Officer
Accountable to	Chief Executive Officer of BDAT
Line Managed by	Finance Manager
Duration of Post	Permanent on completion of a three-month probationary period
Work Commitment	Full time TTO + 2 weeks (or part time by negotiation for the right candidate)
Salary	BDO11 - BDO17
Start date	June 24, as soon as possible

The BDAT FSO will support the central finance team in day to day activities including working with and in our academies. This will include being involved in all finance aspects of the central Trust work.

The majority of work will support the delivery of the Trust business plan, however some academy based work may be required to support individual academies and there may be opportunities for deployment to an academy for extended periods if circumstances dictate.

Line management will be through the Finance Manager of the central team based at Albion Mills, Bradford although some task management may be via the BDAT CEO and CFO.

1. Job Purpose:

To be responsible to the Finance Manager for the provision of an efficient financial service to the Trust and its academies.

2. Key Responsibilities

- 2.1 To be responsible to the Finance Manager, referring complex issues for guidance but expected to work with minimal supervision and be proactive.

2.2 Ensuring financial policies and procedures are adhered to at all times and interpreting guidelines to ensure consistency and accuracy of financial information across the Trust and its academies.

2.3 Assisting with aspects of collation of financial information on new schools joining the trust and ensuring finance systems are in place in time for conversion.

3. Specific Duties

3.1 Processing Financial Transactions

- Raising purchase orders when necessary, ensuring authorisation in accordance with BDAT financial procedures. Print, post or email to the relevant supplier.
- Processing purchase invoices/credit notes, matching with orders/delivery notes and investigating any discrepancies with suppliers. Ensuring copies are imported to PS Financials using the document attach function.
- Being responsible for processing BACS/faster payments via the Trust's bank account
- Producing and distributing email remittance advice notes.
- Monitoring unmatched purchase orders and action as instructed by the Finance Manager.
- Maintaining filing systems for orders and invoices.
- Checking and processing staff expense claims in conjunction with financial procedures and in accordance with set timescales.
- Raising sales invoices and posting inter-company recharges as instructed by the Finance Manager.
- To ensure capital orders are raised in a timely manner and accurate records are kept, both electronic and hard copies, facilitating the completion of the Trust's Fixed Asset Register.

3.2 Financial Systems

- Maintaining the purchase, sales, and staffing ledgers on PSF, ensuring records are up to date and accurate and general housekeeping of the system as necessary in conjunction with the Finance Manager.
- Maintaining/setting up new users and roles on both PSF and Lloyds on-line banking system.

3.3 Accounting Processes

- Calculating and posting monthly funding journals, deferring income where necessary, in conjunction with the Finance Manager.
- Responsibility for the timely submission of the Trust's VAT return, ensuring accurate records are kept and reimbursements made to the academies.
- Reconciliation of bank statements.
- Assisting with the preparation of monthly management accounts, including trial balance analysis, posting accruals and prepayments and monitoring and recording energy data

- Assisting with the preparation of budgets
- Assisting with the administration of the internal audit process, ensuring the timetable is set and reports are collated according to set deadlines.
- Assisting with preparation for the financial year-end and external audit, including collating financial information, nominal analysis and responding to Auditor's requests.
- Any other reasonable finance function as requested by the Finance Manager.

4.0 Continuing Professional Development

- 4.1 The post holder will proactively take part in the Trust Appraisal process.
- 4.2 The post holder will be expected to attend training and continuous professional development events and be responsible for their own professional updating

5.0 Equality and Diversity

The Trust is committed to the provision of equal opportunities and strives to ensure that unfair discrimination does not occur. All employees have a duty to ensure unfair discrimination does not occur and to support the implementation of the Trust's Equality policy as appropriate.

6.0 Safeguarding Children and Vulnerable Adults

The Trust recognises that it has a statutory and moral duty towards safeguarding the welfare of children, young people and, if appropriate, vulnerable adults who participate in any Trust activities and expects all staff to share this commitment.

7.0 Values

The Trust values are an essential part of the Trust achieving its core purpose and it is an expectation that these are adopted in daily working.

- Our learners and customers are paramount.
- Strive to provide excellence in all we do.
- Working together, with mutual respect and support.
- Acting with integrity at all times.

8.0 Trust Policies and Procedures

All staff are required to comply with Trust Policies and Procedures which can be accessed via the website on the internal network drives.

NOTE:

The job description is current as at the date of the appointment. In discussion with your line manager your post description may be varied to reflect or anticipate changes in or to the post and you may be required to undertake other duties commensurate with the grade of your post.

The post holder will undertake any other miscellaneous work, deemed suitable by management of the Trust.

Finance Support Officer

Person Specification

Attributes	Essential	Desirable
Education	<ul style="list-style-type: none"> GCSE Maths and English Grade C (4) or above (or equivalent). 	<ul style="list-style-type: none"> A-levels. Degree. Bookkeeping/AAT qualification.
Knowledge and experience	<ul style="list-style-type: none"> Understanding of basic accounting principles Successful experience of working in a finance related role Experience of finance within academies and schools. Able to demonstrate a willingness to attend appropriate training and development and evidence of relevant personal and professional development. Evidence of working in an environment where experiences included taking initiative and self-motivation as well as teamwork. 	<ul style="list-style-type: none"> Experience of working on PS Financials. Experience of working on IMP Planner Budgeting software.
Skills and Abilities	<ul style="list-style-type: none"> Ability to interpret financial information Intermediate Microsoft Excel skills Ability to organise time and work to deadlines. Good attention to detail. Ability to communicate with members of staff/external stakeholders at all levels ICT including keyboard skills. Organising meetings. Using the internet to access relevant information. 	<ul style="list-style-type: none"> Knowledge of educational funding streams.
Personal attributes	<u>All Essential Criteria</u> <ul style="list-style-type: none"> Ability to work under pressure and manage multiple deadlines. Person of integrity. Ability to maintain confidentiality. Ability to remain impartial. Have a flexible approach to working hours. Be sympathetic to the needs of others. Have an openness to learning and change. Have a positive attitude to personal development and training. Have good interpersonal skills. 	

Special requirements	<u>All Essential Criteria</u> <ul style="list-style-type: none"> • Full driving licence, own car and business insurance cover.
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Terms and Conditions

The employer for this post is the Bradford Diocesan Academies Trust.

The post will be based in the office of BDAT, 2nd Floor, Jade Building, Albion Mills, Albion Road, Bradford BD10 9TQ.

This post requires the postholder to have a driving licence and car insured for work travel. The postholder will be required to work some evenings.

An Enhanced DBS is required for this post.

The post is subject to a three-month probationary period.

The postholder will undertake any other miscellaneous work, deemed suitable by management of the Trust.

All BDAT Trust and Academy business should remain confidential to BDAT.

We are committed to safeguarding and promoting the welfare of children and expect all staff to share this commitment.

All posts are subject to an enhanced criminal records check via the Disclosure and Barring Service (DBS). Please see our Safeguarding and Child Protection policy on the BDAT website www.bdat-academies.org/bdat-business/bdat-policies/

Selection Process Guidance

Safeguarding

We are committed to safeguarding our pupils and will assess the candidate's suitability for working with children as part of the selection process. We will check the accuracy of all information and investigate any perceived anomalies. We take up references prior to interview and use these to verify the information you have given us. Firm offers of employment are never made without satisfactory references. All potential employees are subject to an enhanced disclosure form the Disclosure and Barring Service.

Inclusion

As a Trust we are an inclusive employer. We welcome applications from candidates of all backgrounds, faith, ethnicities or with any protected characteristics. We are simply looking for the very best candidate for the job and will assess your application only on the information in your written application or your performance at interview should you be successfully shortlisted.

We will ensure that the selection process is fair and without discrimination for or against any candidate based on age, ethnicity, gender, religious beliefs, marital status, sexual orientation or disability. The person specification sets out the criteria used to assess candidates through the selection process.

Applications

Please ensure that all parts of the application are completed. We do not accept CVs as part of the selection process. Please ensure that you demonstrate how your experience and skills make you suitable for the position. Applications can be submitted online using the My New Term portal via [Vacancies - Bradford Diocesan Academies Trust \(bdac-academies.org\)](https://bdac-academies.org)

Shortlisting

We assess all applications against the person specification criteria using the evidence you provide in your application. A panel of senior staff and governors do this. We carefully check all applications for anomalies. Candidates who best meet the person specification will be invited to an interview. We will notify you by telephone with e-mail confirmation to follow. If you have not heard from us within 3 days of the shortlisting date, you have not been successful at this stage.

References

We request references for all candidates who are invited to interview. Requests will be made at the same time that candidates are invited to interview. Your first referee should be your current or last employer.

Interview Process

The interviews will be held at the BDAT Trust office. The interview will consist of several tasks and activities including a formal interview. These are designed to allow you to demonstrate your skills and abilities. You will be asked to bring proof of qualifications and identity on the first day.

Final Selection

Following the tasks and formal interview, we will use the person specification as a guide to select the most suitable candidate for our school. We will then telephone each candidate to inform them of the outcome. We will give brief feedback during this telephone conversation.

Offer of Employment

We will make a verbal offer of employment by telephone on the day of the interview, and this will be confirmed in writing. Any offer is made subject to:

- References satisfactory to us.
- A satisfactory DBS check
- A satisfactory online check
- Provision of proof of identity and qualifications

Timeline

Closing Date:	8am on Monday 3 rd June 2024
Shortlisting Date:	Monday 3 rd June 2024
Interview Date:	Wednesday 5 th June 2024
Start Date:	As soon as possible

Questions

If you have any queries on any aspect of the application process please contact the Academy Trust Office on 01274 909120 and ask for Emma Williamson, PA to the CEO and Trust Office Manager or email emma.williamson@bdac-academies.org