



# Recruitment Pack

Tees Valley Education

## Finance Officer

Job Ref: TVE032



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**TEES VALLEY**  
**EDUCATION**  
[www.teesvalleyeducation.co.uk](http://www.teesvalleyeducation.co.uk)

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# WELCOME LETTER FROM THE TRUST



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EDUCATION**

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Dear Applicant

Thank you for expressing an interest in applying for a position working with Tees Valley Education Teaching School Alliance.

Our Trust and Alliance are on an incredibly exciting journey and we are all committed to nurturing, sharing and encouraging outstanding educational practice. We are determined to be centres of educational excellence, pedagogical innovation, research and development. This is to support our children in their life chances, opportunities and employability, as well as our staff's professional development.

Therefore, if you are successful, you will be supporting the development of a brilliant team with two of the academies, (Brambles and Pennyman) deemed to offer 'outstanding' provision in all areas in their last inspections (Summer 2014) and Dormanstown, which was also graded 'outstanding' in three out of five areas with the other two graded as good (Summer 2015).

All of our staff, regardless of their role, work together to ensure that our children are provided with the best education possible. As a Trust, we are committed to giving our leaders and teachers the time, training, development and challenge in order to fulfil their professional duties and responsibilities.

As a Teaching School Alliance our programme of professional development is really important to us and continues to develop all the time. You will therefore have the opportunity to work alongside outstanding practitioners and leaders of education (NLEs and SLEs), in designing and delivering Inset to a variety of colleagues in and across the Trust.

Yours faithfully

*Katrina Morley*

CEO

## ADVERTISEMENT

### Finance Officer Tees Valley Education



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**Status: Permanent**

**Hours: 18 hours spread over 3 or 4 days (whole time)**

**Salary: Scale 26-29 £23,166 - £25,694 (pro-rata starting salary £11,270)**

**Reporting to: Head of Finance & Corporate Services**

Tees Valley Education Trust is a multi-academy trust, established September 2015. We provide 'outstanding' learning environments where our children can achieve excellent outcomes and thereby optimise their life chances and future employability. Well regarded within the local communities we serve, our burgeoning reputation for sustainable success and consistently developing innovative programmes is gaining national recognition.

To support our next stage of development the Trust wishes to appoint a Finance Officer to join the central finance and administration team.

You will be reporting to the Head of Finance & Corporate Services to assist in the preparation of accurate management and financial accounts.

Duties will include:

- Assisting in the preparation of; management accounts, annual budgets, year-end accounts and financial returns to government departments
- Preparation of reconciliations including; bank, payroll, VAT, purchase and sales ledger
- Prepare the VAT return
- Preparing BACs payments
- Processing purchase and sales invoices
- Preparing variance analysis reports covering income, payroll and expenditure

You will be a part qualified accountant or a fully qualified AAT with recent relevant experience in a similar role using accounting software. You will have a good working knowledge of VAT. Experience of academy/school finances and of using Civica accounting software and HCSS budgeting software is highly desirable.

In return, we can offer you the opportunity to join a high quality team committed to developing the Trust and educational standards and opportunities for young people both in the local community and nationally. We have an incredibly strong inclusive ethos and are fully committed to your ongoing professional development.

If you wish to apply, then please make sure that you complete a letter of application, showing how you demonstrate all the characteristics in the job description, person specification enclosed with the pack and why you are suitable for the post. Please do not attach a curriculum vitae; we will only consider information completed as part of the application form.

Letters of application must be addressed and submitted to Mr Simon Grant, Head of Finance & Corporate Services, Tees Valley Education, Kedward Avenue, Middlesbrough TS3 9DB.

If you have any queries about the application process or the position please feel free to Mr Grant on 01642 221156.  
**Visits to the Trust are encouraged and can be arranged by contacting Mr Grant.**

**Closing Date:** Tuesday 28<sup>th</sup> March 2017 at 12 noon

**Shortlisting:** Wednesday 29<sup>th</sup> March 2017

**Interview Date:** Monday 3<sup>rd</sup> April 2017

## JOB DESCRIPTION – FINANCE OFFICER

To play a significant role in supporting the work of the finance department within the Trust, reporting directly to the Head of Finance & Corporate Services, to assist in the preparation and delivery of accurate management and financial accounts.

### FINANCE

#### Cashbook and Bank:

- Ensure daily bank transactions are posted in an accurate and timely way onto the accounting software.
- Carry out a weekly bank reconciliation.
- Prepare cheque and BACS payments and deal with queries.
- Record and analyse data on credit card payments, Parent Pay and Petty Cash.
- Post payments onto accounting software.
- Reconcile all accounts on a monthly basis.

#### VAT:

- Prepare monthly VAT reconciliation and submit monthly VAT return.

#### Purchase Ledger:

- Code and log invoices to Workflow/ on a daily basis for authorisation.
- Ensure authorised invoices are paid within supplier terms.
- Maintain supplier accounts.
- Post transactions accurately and in a timely way so that accounts are up to date at all times.
- Reconcile supplier balances against statements to ensure accounts are correct, following up any differences with suppliers.
- Set up new supplier accounts as requested.
- Reconcile the Purchase Ledger control account.

#### Expenses:

- Process staff expense claims, including checking that claims are correctly authorised, coded and in accordance with company policy.

#### Payroll:

- Prepare monthly payroll reconciliations (Net Salaries Control Account, NI/PAYE, Pensions, and Other deductions).

#### Income:

- Post income and sales invoices onto the accounting software.

#### Management Reporting:

- Management Accounts – assist in preparation of monthly management accounts.
- Variance Analysis – carry out analysis of variances to budget on a monthly basis.
- Budgeting – assist with aspects of setting the annual budget.
- Financial Returns - Assist in the preparation of financial returns to the Education Funding Agency.

#### Year End:

- Assist with aspects of the year end accounting process. Liaise with auditors.

#### Filing:

- Be responsible for the filing of financial documents/data.

### GENERAL

- Comply with policies and procedures relating to child protection, health and safety, confidentiality and data protection and equality. Reporting all concerns to an appropriate person.
- Be aware of and support difference and ensure equal opportunities for all.
- Contribute to the overall ethos/work aims of the Trust.
- Establish constructive relationships and communicate with other agencies/professionals.
- Attend and participate in regular meetings.
- Participate in training and other learning activities and performance development as required.
- Comply with data protection requirements in all working practice and maintain confidentiality, as required.
- Any other duties consistent with the grading of the post.
- The post holder's responsibility for promoting and safeguarding the welfare of children and young people for whom s/he comes into contact will be to adhere to and ensure compliance with the academy's Child Protection Policy Statement at all times. If, in the course of carrying out the duties of the post, the post

holder becomes aware of any actual or potential risks to the safety or welfare of children in the academy, s/he must report any concerns to his/her Line Manager or the academy's Child Protection Officer.

The job holder may be required to undertake additional duties as could be reasonably required.

The job holder may be required to work across the academy group, including for Trust wide initiatives.

The job holder may be required to undertake additional training.

## PERSON SPECIFICATION FINANCE OFFICER

QUALIFICATIONS	Office use only
GCSE Grade C or above in English and Mathematics	E (1)
Relevant clerical, administration or customer service qualification	E (2)
Recent, relevant experience in a similar role using accounting software	E (3)
Part Qualified ACA, ACCA or CIMA or fully a qualified AAT	E (4)
Good working knowledge of VAT	E (5)
EXPERIENCE	
At least 3 years' experience .....	E (6)
Excellent communication skills, oral and written	E (7)
Evidence of using Microsoft Office software e.g. Word, Excel, Powerpoint, Outlook (e-mail)	E (8)
Experience of working in an education setting	D (1)
Experience of using Civica accounting software	D (2)
Experience of using HCSS budgeting software	D (3)
Experience of Academy/School finances	D (4)
KNOWLEDGE, ABILITIES AND SKILLS	
Highly organised and able to prioritise daily workload to meet deadlines	E (9)
Able to work quickly with a high level of accuracy and attention to detail	E (10)
Flexible in your approach to work	E (11)
Numerate with good analysis skills	E (12)
Able to communicate well with staff at all levels of the organisation	E (13)
Able to use initiative to resolve problems	E (14)
QUALITIES	
Enthusiasm and positivity	E (15)
Friendly with a 'can do' attitude	E (16)
Resourcefulness and creativity	E (17)
Ability to work flexibly and co-operatively within a team	E (18)
A team player	E (19)
Sense of humour	E (20)

E – Essential

D – Desirable

**Important:** In the first instance, applications are assessed against the criteria listed above, in addition to overall presentation, use of standard English and grammatical accuracy.

Where applications do not meet the expected standard, they will be rejected before being matched to the person specification.

## SAFEGUARDING CHILDREN

The Trust, and its academies, are committed to Safeguarding and Promoting the Welfare of all children. We recognise that some children *may* be especially vulnerable to abuse e.g. those with Special Educational Needs, those living in adverse circumstances.

**The Trust's Child Safeguarding Policy applies to all adults, including volunteers, working in or on behalf of the Trust.**

Whilst local authorities play a lead role, safeguarding children and protecting them from harm is everyone's responsibility. Everyone who comes into contact with children and families has a role to play.

*Working Together to Safeguard Children DfE 2015*

The Trust pays full regard to DfE guidance 'Working Together to Safeguard Children DfE 2015'. Anyone who works for the Trust, who is likely to be perceived by children as a safe and trustworthy adult (including volunteers and staff employed by contractors), is subject to appropriate checks in line with current legislation and best practice.

Safer recruitment practice includes scrutinising applicants, verifying identity and academic or vocational qualifications, obtaining professional and character references, checking previous employment history and ensuring that a candidate has the health and physical capacity for the job. It also includes undertaking interviews and, where appropriate, undertaking checking details with the Disclosure and Barring Service.

## EXPLANATORY NOTES

Applications will only be accepted from candidates completing the Trust's Application Form. Please complete ALL sections of the Application Form which are relevant to you as clearly and fully as possible. CVs will not be accepted.

### **Safeguarding Children & Young People**

We are committed to safeguarding and promoting the welfare of children and young people. We expect all staff to share this commitment and to undergo appropriate checks, including enhanced CRB checks and DBS checks.

Candidates should be aware that all posts in Tees Valley Education involve some degree of responsibility for safeguarding children and young people, although the extent of that responsibility will vary depending on the nature of the post.

Accordingly, this post is exempt from the Rehabilitation of Offenders Act 1974 and, therefore, all convictions, cautions and bind-overs, including those regarded as "spent" must be declared.

If you are currently working with children, on either a paid or voluntary basis, your current employer will be asked about disciplinary offence, including those related to children or young people (whether disciplinary sanction is current or time-expired), and whether you have been the subject of any child protection allegations or concerns and if so the outcome of any investigation or disciplinary proceedings. If you are not currently working with children, but have done in the past, that previous employer will be asked about these issues.

Where neither your current or previous employment has involved working with children, your current employer will be asked about your suitability to work with children, although it may be answered 'not applicable' if your duties have not brought you into contact with children or young people.

## Interview Process

After the closing date, short listing will be conducted by a panel, who will match your skills/experience against the criteria in the Person Specification. You will be selected for interview entirely on the contents of your application form, so please read the Job Description and Person Specification carefully before you complete your form.

As part of the DBS application and as a form of identification, all candidates invited to interview must bring the following documents:

**Route 1** – 3 documents (at least 1 must be from Group 1, the other 2 can be from any group)

**Route 2** – 3 documents (1 from Group 2a and 2 from 2a or 2b, plus External ID check)

*One document must confirm the applicant's date of birth and another confirm the current address. In addition to the above, if you are successful, you will be required to conduct an external ID check (this is an automated process completed online).*

**Route 3** – 5 documents (birth certificate and 4 other documents - 1 from 2a and 3 from Group 2a or 2b)

*One document must confirm the applicant's current address*

Group 1 – Primary Identity Documents	
Current valid passport (UK or overseas)	Biometric Residence Permit (UK)
Current driving licence - photocard & counterpart (where applicable). (UK, Isle of Man, Channel Islands and EU – full or provisional)	Birth certificate – issued at time of birth (UK, Channel Islands – including those issued by UK authorities overseas)
Adoption Certificate (UK & Channel Islands)	
Group 2a – Trusted Government Documents	
Current driving licence - photocard (UK and overseas)	Current driving licence – paper (UK and EU)
Birth certificate – issued any time after birth (UK & Channel Islands)	Marriage/civil partnership certificate (UK & Channel Islands)
Fire Arms Licence (UK & Channel Islands)	HM Forces ID Card (UK)
Group 2b – Financial & Social history documents	
Mortgage statement (UK or EEA)	P45/60 Statement
Bank/Building Society Statement (UK)	Council Tax statement
Credit Card Statement (UK or EAA)	Work Permit/Visa (UK)
Financial Statement, eg Pension, investments (UK)	Sponsorship letter from employer (outside UK)
Benefit statement, eg child allowance, pension (UK)	Utility Bill
EU National ID card	Cards carrying PASS accreditation logo
Letter from Head Teacher or Principal	
A document from Central/Local Government/Government Agency/Local Authority giving entitlement (UK & Channel Islands), eg from the Department for Work and Pensions, the Employment Service, HMRC, Job Centre, Social Security, etc.	
ID validation must be attempted in order. If you are unable to validate via Route 1, move to Route 2, if unable to validate Route 2, move to Route 3.	

Failure to meet any of the above routes may mean that you will be sent for fingerprinting by the Police which you should be aware is likely to cause delay to the DBS application process and subsequently the recruitment process.

**Please note that originals of the above are necessary. Photocopies or certified copies are not sufficient.**

We will seek references for candidates that are shortlisted for interview and may also approach previous employers for information to verify particular experience or qualifications before interview. Any relevant issues arising from references will be taken up at interview.



In addition to candidates' ability to perform the duties of the post, the interview will also explore issues relating to safeguarding and promoting the welfare of children, including:

- Motivation to work with children and young people
- Ability to form and maintain appropriate relationships and personal boundaries with children and young people
- Emotional resilience in working with challenging behaviours
- Attitudes to use of authority and maintaining discipline

#### **Conditional Offer: Pre-Employment Checks**

Any offer to a successful candidate will be conditional upon:

- Verification of right to work in the UK
- Receipt of at least two satisfactory references (if these have not already been received)
- Verification of identity checks and qualifications
- Satisfactory DBS check
- Verification of professional status such e.g. QTS Status, NPQH (where required)
- Satisfactory completion of a Health Assessment
- Satisfactory completion of the probationary period (where relevant)
- Where the successful candidate has worked or been resident overseas in the previous five years, such checks and confirmations as may be required in accordance with statutory guidance.

## **HOW TO APPLY**

To apply please complete the Tees Valley Education application form. Your supporting statement should address and evidence the selection criteria detailed in the Person Specification.

#### **Applying:**

Application packs can be printed directly from the Trust website [www.teesvalleyeducation.co.uk](http://www.teesvalleyeducation.co.uk) or are available by contacting the Trust on 01642 304406/221156. Unfortunately, we do not accept emailed application forms. Hand written or electronic printed copies should be posted or hand delivered to the following address for the attention of Mr Simon Grant:

**Tees Valley Education**  
**Kedward Avenue**  
**Brambles Farm**  
**Middlesbrough**  
**TS3 9DB**

Visits to the Trust and/or our academies are encouraged and can be arranged by contacting Simon Grant.

<p>Brambles Primary Academy Kedward Avenue Brambles Farm Middlesbrough TS3 9DB</p> <p>Tel: 01642 210704</p> 	<p>Dormanstown Primary Academy South Avenue Dormanstown Redcar TS10 5LY</p> <p>Tel: 01642 483696</p> 	<p>Pennyman Primary Academy Fulbeck Road Middlesbrough TS3 9DB</p> <p>Tel: 01642 314750</p> 
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If you have any queries about the application process or the position please feel free to contact Simon on 01642 221156 or by email at [simon.grant@tved.org.uk](mailto:simon.grant@tved.org.uk)

*Please note: Applications sent by email will not be accepted.*