

**INFORMATION FOR APPLICANTS:**

**MANAGEMENT ACCOUNTANT/FINANCE BUSINESS PARTNER  
(PART QUALIFIED)**



# WELCOME TO THE ESSA FOUNDATION ACADEMIES TRUST

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## ***We recruit people for attitude and train for skills***

We aim to recruit great people. We would rather make no appointment than appoint someone who is not suited to our ethos. For this reason, we clearly articulate our vision, values and expectations when putting together information for applicants and we always give a lot of attention to appointing the right person.

### **We aim to recruit staff who:**

- are excited by their role and by the prospect of working with young people;
- love the processes of learning and teaching and are keen to continually develop their own skills;
- will subscribe to the ethos of the Trust and 'go the extra mile' in terms of time and commitment to get the very best from our young people;
- see break duty as an opportunity to talk to children;
- are quick to praise and slow to criticise; and
- are not afraid to admit to seeing themselves as potential leaders of the future.

We know it's a cliché, but we really do want to recruit people who will make a difference. A high proportion of our children are disadvantaged and many speak to English as an additional language; they face barriers to learning. We are therefore looking for colleagues who are on a mission – the kind of people that make others smile because of their enthusiasm; the kind of people who will get satisfaction from seeing our children learn to do things that staff in other schools might take for granted. In return you will get a lot back from our young people - they are lovely – and you will be working for a trust that will take an active interest in your development.

Finally, I am conscious that this may be your first contact with our Academy Trust and first impressions are very important. I hope what you read, coupled with anything else you discover about us, inspires you to apply for this post.

Andrew Cooper, Chief Executive



## **THE TRUST**

The Essa Foundation Academies Trust currently sponsors two academies:

- Essa Academy, age 11-16.
- Essa Primary School, age 4-11.

Essa Primary School was inspected in October 2019 and was judged to be good in all areas with outstanding early years provision. Essa Academy was inspected in May 2018 and judged to require improvement. However, the academy has developed rapidly and was in the top 20% of schools nationally for progress in 2019.

### Essa Primary (October 2019)

'This is a happy and caring school. Pupils behave well. They listen attentively during lessons and they follow teachers' instructions carefully. No time is wasted in class.'

'Pupils enjoy school. They are polite, and they respect the differences between themselves and their peers.'

'Children get off to a flying start in Reception. Teachers in the early years have created classrooms brimming with exciting learning activities.'

Inspectors also praised the leadership of the Principal and her team who they said 'have worked tirelessly to develop the school.'

### Essa Academy (May 2018)

'The new Principal has provided highly effective leadership...he is very ambitious on behalf of his pupils.'

'The Principal has the full support of his senior leaders, who are equally uncompromising in their desire for pupils to have the best possible life chances.'

'Pupils are typically welcoming, polite and well-mannered.' They 'confidently shared with inspectors their understanding, appreciation and celebration of British values. Pupils respect differences and value diversity.'

Pupils also told inspectors that they feel safe and the school is 'a happy place to grow up in.'

## **VISION & VALUES – All Will Succeed**

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Our ethos is simple: we will make the most of our unique family of schools to give every child the best possible opportunity to flourish and develop into a decent, disciplined, well-educated and employable young person.

Here is what is at the heart of all we do:

### **Developing decent people:**

Results and qualifications are important, but they are not the whole story – far from it. Our ultimate goal is to develop well-rounded young people who will make the most of the opportunities open to them in our schools. They will have resilience, zest and passion: people that employers will want to employ; people who will play a part in the communities in which they live and work; people we can be truly proud to say came through one of our schools.

**Achieving full potential, no excuses:**

We will do all we can to make sure every child gets the chance to reach their full potential. No child should ever get left behind; all have the capacity to learn and to achieve. We'll do this by instilling an acceptance that hard work, effort and application really does pay off. Through effort and application come self-respect, self-esteem, self-belief and success.

**Discipline and standards:**

It is important to us that our young people demonstrate high standards and that our schools are safe, structured places in which to learn – this will enable inspiring things to happen in the classroom. We will achieve this by expressing our high expectations regularly and frequently and by paying relentless attention to detail. We attach importance to values such as respect: for ourselves, for others, for learning and for the environment.

**Great Schools for all:**

We want the schools within our Academy Trust to be judged as great schools for all the young people that attend them. This means recruiting outstanding people to work in our schools and offering a curriculum that is engaging, challenging and responsive to individual needs.

**Big on attitude:**

We will frequently stand back and reflect on how we can do things differently and better. That doesn't mean latching on to the latest fad: it means being open-minded about trying new ideas; it means acknowledging mistakes but seeing them as an experience from which to learn; it means being aware of what happens beyond our schools so that we can predict future trends and remain in control of our destiny.

**Strength in sharing:**

We believe there is a strength brought about by working together within a multi-academy trust, enabling shared resources, shared knowledge, shared experience and shared success. What's great about our family of schools is that we can be with a child every step of the way, from teaching them to tie their shoe laces right through to congratulating them on their GCSE results and their future plans. That puts us in a unique position; it's also a tremendous responsibility.

# Essa Foundation Academies Trust

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The Essa campus is very well placed for both motorway access and public transport. M61 J4 is very close by giving access to the Greater Manchester, Lancashire and Cheshire motorway networks and is close to Bolton railway and bus station.

For more information on our family of schools please visit our website [www.efatrust.org](http://www.efatrust.org)



## **Essa Primary School**

We are proud of our pupils, and their achievements. Our key objective is to provide our children with the best opportunity to achieve their potential during their time with us as we help them to develop into independent learners who are able to actively engage and contribute to the ever changing society and wider world.

## **Essa Academy**

At Essa Academy we have a universal belief in our mission 'All Will Succeed', with access to outstanding resources and a strong sense of belonging, ownership and community underpinning our work. Our students and staff are amazing and reflect the ethos of the academy.



## **EFAT Support Services**

We provide administrative and business support such as HR and Finance Support throughout the trust.

## **Essa Education Ltd**

Essa Sports Centre is a modern, state of the art sports facility and community asset, used for a variety of academic and sporting needs, as well as events, meetings, conferences birthday parties and more.

Our facilities include a full-sized 3G pitch, multi-use sports hall, dance studio and MUGA (Multi-Use Games Area). Other facilities available for hire include theatre with stage, classrooms & communal dining area.

Essa Education Ltd is a wholly owned subsidiary of Essa Foundation Academies Trust.

## THE POST

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We are seeking to appoint a part qualified Management Accountant/Finance Business Partner to support the Chief Financial Officer in providing operational leadership for all financial and business aspects of the Trust, which currently comprises a primary and secondary academy, both on the same site.

### **The Management Accountant/Finance Business Partner will be accountable for:**

- Assisting the CFO in the production of EFAT monthly management accounts pack for key stakeholders.
- Deputising for the Chief Financial Officer when necessary, e.g. visits by Auditors and LGBs
- Assisting in the production of audit reports
- Support the production of statutory reports
- Compliance reports for DfE, ESFA etc
- Sales Ledger

We are seeking a part qualified individual who is actively studying towards an ACCA, CIMA or ACA qualification. Study support will be available for the right candidate.

With extensive experience of month end procedures, the successful candidate will also have experience of the management and development of staff. Overall, the Management Accountant will be an excellent communicator, with the ability to remain calm under pressure whilst managing multiple projects and deadlines.

This is a full-time role, working all year round, however we are willing to discuss flexible working arrangements (i.e. part time hours) with the right candidate.

## RECRUITMENT TIMETABLE

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Tuesday 20 <sup>th</sup> October 2020	Advertisement appears
Monday 2 <sup>nd</sup> November 2020	Closing date for applications (by 07:00am)
Monday 2 <sup>nd</sup> November 2020	Final shortlisting and contact with candidates References will be requested at this stage
TBC	Interviews

## **Job Description**

<b>Post:</b>	Management Accountant/Finance Business Partner
<b>Grade:</b>	Grade F Scp 17-23 (£24491-£27741 per annum FTE)
<b>Department:</b>	Finance
<b>Responsible to:</b>	Chief Financial Officer
<b>Terms:</b>	All year round
<b>Hours:</b>	Up to 37 hours per week

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## **Main Duties**

### **Assist the Finance Director with:**

- Producing EFAT monthly management accounts pack for key stakeholders
- Deputise for the Finance Director when necessary, e.g. visits by Auditors and LGBs
- Assist in producing audit reports
- Support the production of the statutory reports
- Any compliance reports for DfE, ESFA etc

### **Take responsibility for:**

- Month end reports
- Monitor expenditure against restricted budgets, e.g. pupil premium, SEN funding, year 7 catch up funding etc
- Producing Essa Education monthly monitoring reports
- Monitoring of school trips to ensure processes are followed and monies are recovered from the parents
- Complete the VAT return.
- Calculation and processing of month end and year end journals
- Producing monthly control accounts for approval by the Finance Director
- Maintaining long term cash flow forecast
- Maintaining a cash register and banking of any income
- Maintaining Fixed assets register.
- Manage income and expenditure from Sports Centre lettings and external visits.
- Maintain financial records in line with paperless procedures, retaining records for seven years and disposing of all old paper records appropriately.
- Sales Ledger and income monitoring

### **Monitor and assist with (if required):**

- Assist Finance Assistant during busy periods in processing of purchase orders and invoices
- Process orders for budget holders upon approval, and provide information on delivery status and budget balances as requested.
- Process credit card orders and reconcile monthly statements.



- Process invoices by scanning to file ensuring placement in the correct folder within financial planning, obtaining signatures and inputting into Accounting System.
- Assist with any school insurance claims.
- Carry out other duties as directed by Finance Director.

### **Customer Care**

- To continually review, develop and improve systems, processes, and services in support of the Academy's pursuit of excellence in service delivery. To recognise the value of its people as a resource.

### **Develop oneself and others**

- To make every effort to access development opportunities and ensure you spend time with your manager identifying your development needs through your personal development plan.
- To be ready to share learning with others.

### **Valuing Diversity**

- To accept everyone has a right to his or her distinct identity. To treat everyone with dignity and respect, and to ensure that what all our customers tell us is valued by reporting it back to the organisation. To be responsible for promoting and participating in the achievement of the departmental valuing diversity action plan.

### **Generic Requirements**

- It is a requirement of all posts within the Trust that Health and Safety requirements are upheld in the performance of all duties.
- All employees of the Trust are required to uphold the Equality and Diversity Policy and the Trust's Code of Conduct.
- All staff will ensure the safeguarding of young people by the implementation of Child Protection and other safeguarding policies.
- All staff will ensure the safeguarding of young people by the implementation of Child Protection and other safeguarding policies.
- All staff will ensure that they are aware of and work within the requirements of all Every Child Matters policies, seeking clarity from a member of Senior Leadership if necessary.
- All staff are expected to uphold all Personnel related policies.

This job description is subject to change.

Employee Name .....

Date .....



## Person Specification

**Post:** Management Accountant/ Finance Business Partner  
**Grade:** Grade F SCP 17-23  
**Department:** Finance  
**Responsible to:** Chief Financial Officer

		Essential	Desirable*
<b>Qualifications and Training</b>		✓	✓
1.	GCSE at A* – C in Maths and English	✓	
2.	Actively studying towards one of ACCA or CIMA or ACA (must have already made some progress)	✓	
<b>Experience</b>			
3.	Extensive experience of month end procedures (accruals, prepayments etc.)	✓	
4.	Evidence of working in an environment where experiences include taking initiative and self-motivation.	✓	
5.	Experience of management and development of staff	✓	
6.	Experience of producing financial forecast on a regular basis		✓
7.	Experience of PS Financials or other Finance system.	✓	
<b>Skills, Knowledge and Aptitude</b>			
8.	Good listening, oral and literacy skills.	✓	
9.	Ability to organise time and work to deadlines.	✓	
10.	ICT competent.	✓	
11.	Confident with spelling and grammar.	✓	

<b>Essential Attributes for All Posts</b>			
<p><b>Valuing Diversity:</b> To accept everyone has a right to their distinct identity.</p> <p>To treat everyone with dignity and respect and to ensure that what all our customers tell us is valued by reporting it back into the organisation.</p> <p>To be responsible for promoting and participating in the achievement of the school's diversity and inclusion policy.</p>			
<p><b>Caring for Customers:</b> To provide quality support for teaching and learning.</p> <p>To give parents, families and the community the opportunity to comment or complain if they need to.</p> <p>To work with the Academy community and do what needs to be done to meet their needs.</p> <p>To inform your manager about what the Academy community say in relation to the school/setting.</p>			

\* In the event of a high number of applications, the desirable criteria will become essential.

## HOW TO APPLY

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Please read the information in this pack. If you decide to apply you should include a letter with your application form on no more than two sides of A4, giving your reasons for applying for the post, addressing information you have read in the pack and particularly the person specification, and outline any relevant experience and personal qualities you would bring to Essa Foundation Academies Trust. The application form can be found on the vacancies page of our website at: <http://www.efatrust.org/index.php/current-job-opportunities/>

Please do not send a general letter; we really are looking for someone who is prepared to respond to us as an individual. You can be sure we will take time and care in reading your letter; we appreciate how much energy goes into it. **Please ensure that you address your application to Mr Adeel Sahi, CFO, EFAT, Lever Edge Lane, Bolton, BL3 3HH. Telephone: 01204 333 222 or E-Mail: [hr@efatrust.org](mailto:hr@efatrust.org)**