



The Diocese of Chelmsford

Vine Schools Trust

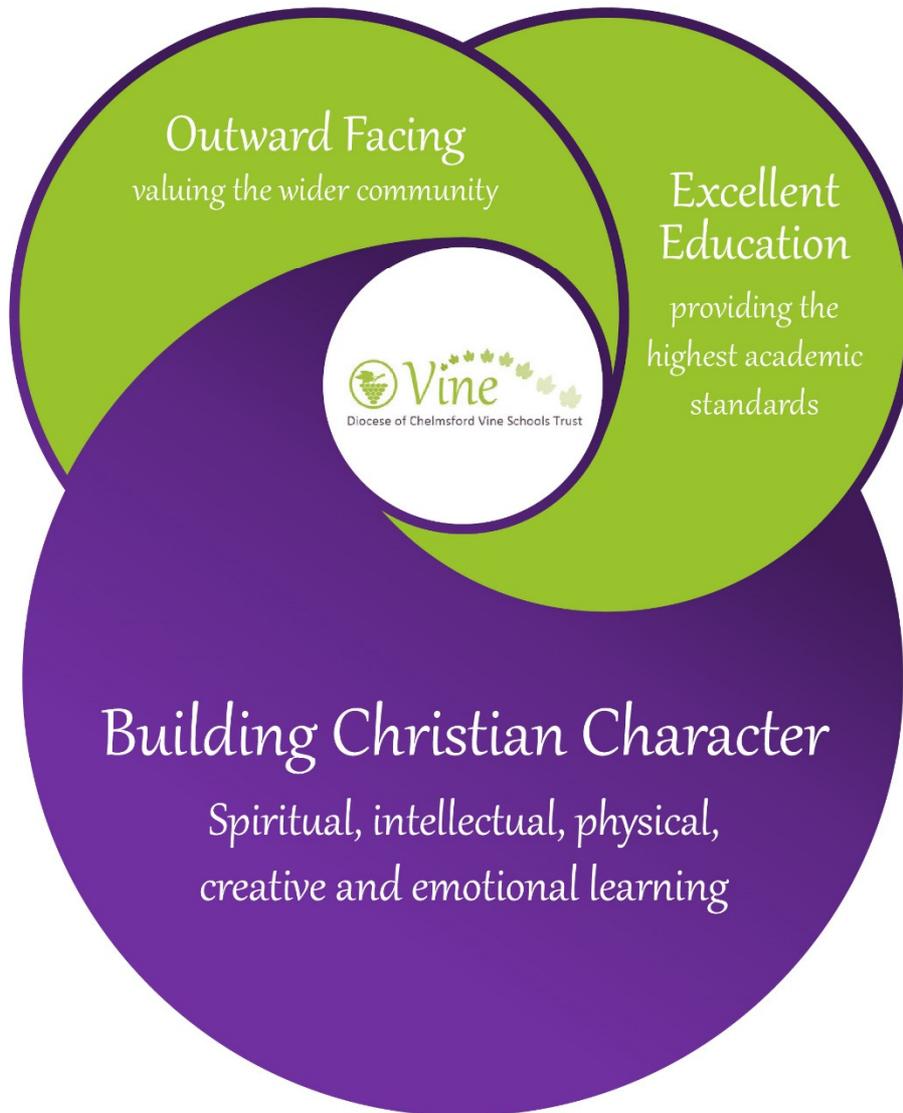
Consultation on

Financial Structures

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Our Vision and Values



Dear Colleague,

Staff and Trade Union Formal Consultation on the Proposed Reorganisation of the Vine administrative finance and support staff. This does not include teaching support staff.

You will be aware of discussions relating to potential changes and the proposed reorganisation of the Vine Staff with responsibility for finance and HR in each of our academies. This paper proposes a major change to the current arrangements for managing and deploying the staff with responsibility for finance and HR functions.

This consultation pack details:

1. The rationale for the proposal;
2. The proposals for the restructure;
3. The process for moving from the current structure to the new;

These papers will be sent to the home address of any absent employees.

I would like to invite you to attend a formal consultation meeting on the proposals in Chelmsford on Wednesday 31st October 2018. Trade Unions are being consulted separately but are also invited to attend this meeting.

In addition there will be the opportunity for you to discuss any concerns on a one-to-one basis, with me. If you would like to arrange a convenient time please contact me by email at coo@vineschoolstrust.org.

The timetable is included below with a closing date of Friday 26th October 2018.

I confirm that advice and support is available to you from your trade union and/or the Wellbeing Service by contacting 0333 013 5859 - option 2 and then:

Option 1 for Occupational Health

Option 2 for Staff Counselling Service

Yours sincerely

Brendon Ince (Chief Operating Officer)

Tel: 01255 863646

Email: coo@vineschoolstrust.org

1. Executive Summary

The aim of this paper is to initiate formal consultation on the proposed organisational changes for the Diocese of Chelmsford Vine Schools Trust (the Vine) finance and HR. It is proposed that new finance structures will be put in place for individual academies and across the Vine in order to ensure the leadership of each academy has accurate, timely information, in a cost-effective manner. It is proposed that the new structure is fully implemented from 1st April 2019.

2. Rationale

The Education sector is undergoing an unprecedented period of change. The introduction of multi-academy trusts, the declining role of local authorities and the constant pressure on budgets are a few of the current changes taking place. Whilst these present challenges, they also create opportunities.

These proposals will enable the Vine to take advantage of the trend within the sector to centralise services, making best use of the opportunities our size provides to deliver effective financial and HR services. This will enable us to ensure we maximise the amount of funding we spend on our pupils in a climate of reducing finance available within education. As the Vine grows further, we will be better placed to continue exploring how to improve effectiveness and efficiency thereby ensuring teaching, learning and outcomes for pupils' remains at the forefront of our thinking.

It is acknowledged that the role of the finance/HR officer in an academy compared to a maintained school is very different. These proposals will provide an effective model for the multi-academy trust sector.

3. Procedural Arrangements for the Implementation of Staffing

The Directors are committed to making the appointments to the proposed staff structure as soon as possible and to implement the procedures with the minimum of disruption and distress to the staff involved.

To aid this process, this pack has been prepared to provide information relating to the procedures which will be followed to implement the necessary changes to the staffing structure.

4. General Principles

Employees covered by the procedures

The procedure covers all staff currently engaged in finance activity currently employed at all Diocese of Chelmsford Vine Schools Trust schools. This includes Academy Financial Leads and staff engaged in processing and HR functions.

Consultation

It is the Directors' intention to consult with the relevant trade unions and professional associations and with staff about the procedures described in these documents and their application.

At any stage in the procedure, staff are entitled to be accompanied or represented by their trade union or professional association, except in relation to selection interviews.

5. Appointments to the new structure

Appointments to all posts will be in accordance with the procedures set out in this document.

Ring-fence Arrangements

In general, posts will not be advertised externally unless and until it becomes clear that staff currently employed within the Vine cannot fill such posts. Detailed ring-fence arrangements are specified in the 'procedures for appointments' section at the end of this document.

1. Slotting

Where practicable, employees will be offered posts, which are directly comparable to their present post, without the need for interview, which is called “slotting”. Employees will be asked to identify a post in the new structure that they believe is comparable with their present post. The COO will then make the decision concerning the comparability and if the posts are slottable.

Those staff who do not wish to be slotted, may, by not accepting the slotting, not be entitled to a redundancy payment in the event of their employment ending, having declined the opportunity of suitable alternative employment.

Staff who have been slotted may also apply for any vacant post which arises once the detailed ring-fence arrangements (shown in the ‘procedures for appointments’ section at the end of this document) have been exhausted.

2. Offers of Alternative employment

Where it has not been possible to “slot” a current member of staff into a directly comparable post within the new structure, it may be possible to offer alternative employment in a similar (but not directly comparable) post. Salary protection (see later section) may be available.

Those staff who do not wish to accept alternative employment may not be entitled to a redundancy payment in the event of their employment ending, if they have declined an offer of suitable alternative employment.

3. By application

Interviews will be held for all posts where slotting is not deemed appropriate or where a post cannot be offered as suitable alternative employment. All applicants within the ring-fence arrangements described in the ‘procedures for appointments’ section at the end of this document will be entitled to an interview. Where only one application is received for a post, the appointment may be confirmed subject to the applicant demonstrating to the interview panel that they meet the person specification for the post.

All appointments will be made on the basis of the individual’s suitability for the post in light of the job description and the person specification.

Applications should be made using the Vine application form and submitted to the COO no later than the date specified on the timetable.

Interview arrangements will be notified in writing within a reasonable period before the interview.

An appropriately qualified selection panel drawing on **Vine central staff and local headteachers (dependent on the post)** will be appointed and will conduct the interviews.

The decision to offer appointments will be made and notified to candidates as soon as possible following interview.

Feedback will be offered to all unsuccessful candidates as soon as practicable after appointments have been made.

Appointments to the new structure will be effective from 1st April 2019 or sooner if practical.

6. Salary Protection

Any member of support staff who, at the end of the process described above, is offered a new post at a lower grade than their existing post, will (while they remain in their new post) be entitled to salary protection (maximum one Band) for 18 months. This salary protection will take the form of their salary being protected for 18 months at the lesser of their current salary point or the maximum

of the next Band above the Band for the new job. During this time cost of living increases will apply but there will be no incremental progression.

There is no protection for hours worked per week or weeks worked per year.

General points on protection

In cases where some initial protection of earnings is necessary, the Vine Trust Board will seek to allocate duties commensurate with the level of protection.

Subsequently, should a suitable vacancy arise, the Vine Trust Board will, after full consultation with the member of staff and his/her trade union or professional association, endeavour to return the member of staff to an appropriate area of work where the level of protection can be reduced or eliminated.

The protection provisions will continue to apply where a member of staff is appointed to a post higher than their protected post, but lower than their post prior to these appointment procedures. The protection provisions will cease where staff voluntarily pursue and are offered alternative employment elsewhere after the date on which they were offered a post under these appointment procedures.

7. Redundancy avoidance measures

Where there is a potential redundancy situation, it is the intention of the Vine Trust Board, to avoid compulsory redundancy. In order to achieve this, in addition to the measures already outlined in this document, the Vine Trust Board will:

- Seek applicants for re-deployment and, where this is not viable, voluntary redundancy, subject to the agreement of the Vine Trust Board, where this would help avoid compulsory redundancy of other staff
- Seek to draw to the attention of staff who are at risk of redundancy suitable vacancies
- Re-train staff who wish to have re-training, where practicable and relevant to the needs of the Vine Trust

8. Compulsory redundancy

Where an individual is unsuccessful in obtaining a post either by slotting, an offer of alternative employment or interview, they will, by definition, be at risk of redundancy. Such an individual will be entitled to a formal meeting / hearing to contest the recommendation of their redundancy, and an appeal, in accordance with the Vine Trust's redundancy procedure.

9. Equal Opportunities

The Directors are committed to implementing these procedures fairly and equitably.

10. Other

Nothing in this procedure is intended to preclude staff currently employed within the Vine Trust from applying for alternative posts elsewhere.

11. Procedures for appointments

Suitability for slotting

Those who believe that their current post is comparable with a post within the new structure need to complete the [Vine Slotting Form](#). This will be reviewed by the COO and if he agrees the employee will be slotted into the new post without the need for an application. If the COO agrees that more than one members of staff has a current roll that is slottable with a roll within the new structure

then a competitive interview process will take place. Not being slotted into a position within the new structure does not stop the employee applying for a position in the new structure via the application process below.

Finance Staff posts to be offered as suitable alternative employment

It may be possible that members of staff will be offered other suitable employment. This will be considered on a case by case basis at the local level. Employees should contact their headteacher / Chair of Local Governors to assess if this is possible.

Finance staff posts to be appointed by application

Applications to new posts are welcomed by all employees who are not slotted into a new post or offered alternative employment locally. All applications should be made via the [Vine application form](#).

12. How to Respond

We welcome your views.

Hard copy responses can be sent to:

Vine Trust Board
53 New Street
Chelmsford
CM1 1AT

Email responses can be sent to:

coo@vineschoolstrust.org with 'Response to Finance Consultation' in the subject header

The closing date for responses is Friday 26th October 2018.

When providing your response, please also provide contact details - we may seek further information or clarification of your views.

13. Current Finance and HR Structure

Vine Central Team

Chief Operating Officer, Finance Manager, Finance Officer, Finance Assistant, Support Manager, Support Assistant, Academy Support Officer, Payroll Administrator, CEO PA

																		
Southminster	St Cedds	St Andrew's	Rolph	Mistley Norman	St Osyth	Great Clacton	Howbridge	Rivenhall	Latchingdon	St James Colchester	St Margaret's	Bulphan	Orsett	Ridgewell	Belchamp St Paul	William Martin Infants	William Martin Juniors	St James Harlow
Finance Officer Finance Assistant		Finance Officer Finance Assistant		Finance Officer		Finance Officer	Finance Officer	Finance Officer	Finance Officer	Finance Officer	Finance Officer Finance Assistant	Finance Officer						

14. The Case for Change

a. Reduce Risk

Currently new academies joining the Vine take a significant period of time to fully adopt the procedures necessary to become fully compliant. There is evidence that some academies which have been part of the Vine for some time are still not implementing the correct procedures and are therefore still not locally compliant. These shortfalls are currently picked up by the Vine Central Team creating significant additional workload. If the Vine becomes non-compliant the result will be a 'Financial Notice to Improve' which will have a significant negative impact upon the financial operations of all Vine academies.

These proposals reduce risk by building in capacity, reducing the numbers of staff responsible for budget planning and preparation, thereby reducing the time taken for a new Vine academy to become financially compliant.

b. Growth

The new structure will allow for expertise to be shared across academies by matching responsibilities with pay grades and providing clear accountability structures. This ensures that the Vine is in a position for growth and will fit with the Vine collaborative model of shared expertise and interdependence.

c. Career Pathways

Currently individual academy finance/HR staff carry out a range of roles linked to various pay grades. As a result they have developed skills and knowledge in many different areas rather than specialising in a particular field; they are paid at the highest rate when carrying out all functions which is financially inefficient. The proposed model will match the job role to the pay grade and therefore provide greater financial efficiency and consistency across the Vine. In turn career pathways will be created for finance/HR staff as different job roles, matched to the pay grade, are created. This will give the Vine opportunity to develop CPD opportunities aimed at improving a skilled workforce with a clear career progression.

d. Increased Capacity

Capacity pressures at local academy and central team level are significantly influencing the quality and accuracy of financial and forward forecasting information. The proposed model facilitates increased capacity through the location of staff and concentration of skills. Reducing the points of contact between local academies and the central team will make the system more effective and efficient.

e. Effectiveness

The current model does not provide consistent, timely, accurate or effective information for individual academy leadership, Central Team or the Vine Trust Board. This is largely due to the need to complete and repeat the same tasks in each individual academy. The new model will concentrate expertise, improve standardisation, and match responsibility to pay grade thereby enabling staff to become skilled in specific areas and enabling more effective and efficient information to be provided to leaders across the Vine.

f. Cost effective

By improving the economies of scale the new model will be cost effective at a time of reducing academy budgets.

15. Proposed Finance and HR Structure

Vine Central Team

Chief Operating Officer, Finance Manager, Finance Officer, Finance Assistant, Support Manager, Support Assistant, Academy Support Officer, Payroll Administrator, CEO PA



Local Academy Business Manager

Local Academy Business Manager will be based in one of the local academies they are responsible for and visit the other local academies they are responsible for. This will enable them to have regular communication with headteachers and local governors. They will be responsible for the strategic financial planning and HR functions within their academies, working with Headteachers and local governors to ensure efficient working, reporting to the Central Team and the Vine Trust Board.

Local Academy Finance Officer

The Vine Trust Board recognise that where the Academy Business Manager has responsibility for more than 3.5 forms of entry additional finance support will be required. They will be based locally with the Academy Business Manager and be responsible for supporting them in the financial strategic leadership of the schools.

Central Processing Team

The central processing team will be based in Chelmsford, alongside the Central team. This is central to the Vine Trust sphere of operation. While they will be responsible for specific academies within the Vine, this will provide us with capacity to support all academies at busy periods.

16. Job Descriptions

Job Title	Academy Business Manager
Grade	Band 5
Reports to	Chief Operating Officer Headteacher's at XXX CofE Primary School's Local Governors
Liaison with	Headteacher, Local Governors, Vine Central Team, Vine Processing Team, External Agencies, Auditors
Job Purpose	<ul style="list-style-type: none"> ○ To give strategic vision and leadership to all aspects of budget, finance and human resources ○ To lead, operate, maintain and develop the financial procedure and systems of the school, in co-operation with the Headteacher, local governors and Vine COO ensuring that legal and safety requirements with regard to people and property and function of the school are maintained ○ To be responsible for the school site and its buildings, maintenance, development and efficient use. ○ To function as line manager for all office based support staff ○ Play a central and creative role in the Leadership Group ○ Ensure that the school is fully prepared to meet EFSA financial criteria ○ To liaise with the relevant members of the Vine Central Team and funding bodies
Duties	<p>General</p> <ul style="list-style-type: none"> ○ To lead and advise the Leadership Group on matters relating to finances, estates and Health and Safety ○ To attend all finance Local Governing Body/Local Board meetings ○ To take delegated responsibility for financial and premises decisions following appropriate discussions with the Headteacher ○ Support internal/external audit ○ To deputise for the Headteacher as required in relevant fields of expertise <p>Health and Safety</p> <ul style="list-style-type: none"> ○ To formulate, monitor, implement and review the school's Health and Safety policy including all Risk Assessment procedures ○ To advise staff as appropriate ○ To report to local governors on Health and Safety

- In co-operation with the Fire Service, ensure the installation and maintenance of equipment for protection against, and escape from, fire. Keep records and initiate regular fire practices
- Premises**
- To be responsible for the overall management and maintenance of the buildings, facilities, grounds, fabric and furnishings of the school, working with the Headteacher. Specific responsibilities include:
 - Taking the lead on compiling and implementing a Premises Development Plan including energy conservation
 - Through regular contact with the premises staff ensuring the proper maintenance and repair to the school is carried out and progress monitored
 - Ensuring the appropriate placing and monitoring of all service contracts including cleaning and catering
 - Advising on all Health and safety matters including measures in the event of emergencies
 - Appraising projects for the development of the school
 - To be responsible to the Headteacher for the security, maintenance, heating, cleaning and other general site services within the premises
 - To deal with all external agencies delivering services to the school and to deal with all aspects of tendering, including Compulsory Competitive Tendering
 - To be responsible for liaison with premises staff regarding letting of the school premises to outside organisations and school staff, the development of all school facilities for out of school use with particular reference to the local community
 - Ensuring the purchase, repair and maintenance of all furniture, equipment and fittings
 - Monitoring the work of on-site contractors and arranging estimates for work.
 - Ensuring that the best use is made of premises personnel and to be responsible for their allocation of hours and pay claims
 - Monitoring and overseeing the quality of work by contractors, caretakers and cleaning staff; reporting to governors, as appropriate
- Human Resources**
- To provide leadership and guidance for support staff, including direct line management responsibility where appropriate – administrative and clerical; financial; technical; medical and welfare; maintenance and ground staff; cleaners and caterers
 - To be responsible for general personnel matters: in particular to issue contracts of employment. To give advice to local governors on assessment of salaries, expenses, sickness and maternity procedures, redundancy and other matters of dismissal. To attend at Employment Tribunals as necessary. To maintain confidential staff records and to ensure that they are held in a secure, confidential manner
 - To be responsible for professional development, appraisal and training of all office based support staff including satisfactory monitoring and reporting of probationary periods
 - To be responsible for all staff contracts and to co-ordinate the administration for support staff recruitment
 - To advise the local governors on the policy needed to comply with legislation concerning employment protection, equal pay, sex discrimination etc. and the implementation of these policies in the school

	<ul style="list-style-type: none"> ○ To formulate, monitor and implement the school’s safety policy to comply with the requirements of Health and Safety at Work Act and other legislation ○ To act as the school’s Health and Safety Co-ordinator and Fire Officer <p>Financial</p> <p>Working with the Headteacher, the Finance and HR Manager will prepare an annual budget for the school to be recommended by the Local Governing Body / Local Board to the Vine Trust Board and will provide specific expertise on long-term financial management. The Academy Business Manager will be responsible specifically for:</p> <ul style="list-style-type: none"> ○ Comply with the Trust financial regulations and the academies financial handbook. ○ Ensuring the school has appropriate financial systems and managing all aspects of the school’s financial systems (including voluntary funds such as School Fund) in accordance with these agreed policies and timetable; ensuring accurate financial records are maintained and reported on a regular basis to the Headteacher and local governors ○ To ensure that the financial transactions in the school are carried out in an appropriate manner and that the financial regulations of both the Vine and the school are observed ○ Preparation for approval by local governors of annual estimates of income and expenditure. The provision of detailed management accounts for the local governors and Head according to an agreed schedule, reporting immediately any exceptional problems ○ The operation of all bank accounts, ensuring that a full reconciliation is undertaken at least once per month ○ Manage the school’s financial IT package giving guidance to other users ○ To prepare appraisals for particular projects and the development of long term initiatives for the school ○ To co-operate, initiate and manage audit procedures as necessary ○ To prepare all financial returns within statutory deadlines ○ To lead on writing the financial sections of bids for funding as required by the Vine Trust ○ Manage the tendering for all non-Vine directed service contracts; monitor all insurance policies with a view to cost effectiveness ○ Submit capital bids to the Vine, monitor and control of capital expenditure on buildings and grounds, placing of contracts, appointment and monitoring of contractors ○ Promote the school’s activities and premises with the objective of maximising letting income within agreed policies ○ Support staff responsible for delegated budgets with procedures which enable them to monitor these budgets ○ Monitor the standard and cost effectiveness of the school’s catering arrangements in conjunction with the catering manager within agreed performance indicators
General	<ul style="list-style-type: none"> ○ To participate in the performance and development of review processes, taking personal responsibility for the identification of learning, development and training opportunities in discussion with the Chief Operating Officer and Headteacher ○ To comply with individual responsibilities, in accordance with the role, for health & safety in the workplace ○ Ensure that all duties and services provided are in accordance with the School’s Equal Opportunities Policy

	<ul style="list-style-type: none"> ○ The Vine Trust Board is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share in this commitment ○ The duties above are neither exclusive nor exhaustive and the post holder may be required by the Chief Operating Officer or Headteacher to carry out appropriate duties within the context of the job, skills and grade
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Person Specification Academy Business Manager	Detail	Examples
Qualifications & Experience	Specific qualifications & experience	An appropriate financial professional qualification Successful management experience Successful accounting experience working in school financial environment An understanding of primary school ethos
	Knowledge of relevant policies and procedures	Understands Vine Trust financial systems and procedures (training will be provided) A detailed working knowledge of MIS A detailed working knowledge of personnel and employment issues
	Literacy	Good pass in English GCSE (or equivalent)
	Numeracy	Good pass in Maths GCSE (or equivalent) The ability to prepare, monitor, evaluate and review the budget Preparation, understanding and interpretation of all financial data
	Technology	Thorough working knowledge of ICT and the software relating to finance.
Communication	Written	Ability to complete complex returns, write complex letters and reports.
	Verbal	Ability to exchange complex information clearly and sensitively. Ability to address COO, SLT and Local Governing Body / Local Board
	Languages	Ability to exchange complex information clearly and sensitively. Ability to address COO, SLT and Local Governing Body / Local Board
Working with children	Behaviour Management	Understand and implement the Behaviour Management Policy, as required.
	Health & Well being	Understand the importance of physical and emotional wellbeing
Working with others	Working with partners	Understand the importance of physical and emotional wellbeing
	Relationships	The ability and personal qualities to motivate staff The ability to receive as well as give constructive advice
	Team work	Ability to work well in a team, both as a member and leader
	Information	Develop and implement effective systems to share and safeguard information.
Responsibilities	Organisational skills	Experience of strategic planning activities and the development of business plans Experience of financial planning, financial management and budgetary control within an organisation Have the ability to plan at both the tactical and strategic level
	Line Management	Experience of leading, managing and motivating a team of staff Offer dynamic and effective leadership

	Time Management	Be well organised, have a high level of initiative and be able to delegate effectively and appropriately Able to ensure that tight, strict deadlines are met.
	Creativity	Demonstrate a highly creative approach to work Able to resolve complex problems independently.
General	Equalities	Demonstrate commitment to treating all people fairly
	Health & Safety	Excellent understanding of Health and Safety.
	Child Protection	Understand and comply with Child Protection procedures.
	Confidentiality/Data Protection	Understand and comply with procedures and legislation relating to confidentiality
	CPD	Demonstrate a clear commitment to develop and learn in the role. Able to effectively evaluate own performance Ability to transfer new knowledge to the workplace

Job Title	Central Processing Supervisor
Grade	Band 4
Reports to	Chief Operating Officer
Liaison with	Vine Central Team, Vine Processing Team, Academy Business Managers
Job Purpose	<p>To lead the team of Central Processing Assistants.</p> <p>To be responsible for all processes (ordering, invoicing, paying/receiving, recording) in relation to routine financial transactions within the academies that are members of The Diocese of Chelmsford Vine Schools Trust.</p> <p>To accurately maintain the financial accounting system in respect of routine transactions.</p> <p>To ensure that all procedures relating to routine transactions are carried out in accordance with financial regulation, good practice and relevant statutory legislation</p>
Duties	<ul style="list-style-type: none"> ○ Comply with the Trust financial regulations and the academies financial handbook. ○ Support internal/external audit ○ To supervise the processing of financial information for Vine academies. ○ To oversee the processing of orders (ensuring correct coding etc) ○ To set up and monitor annual orders/service contracts (e.g. telephone, grounds maintenance, leases) ○ To process and record all creditor invoices ○ To ensure that all payments to creditors are properly authorised ○ To deal with all creditor queries and statements, by telephone or written correspondence ○ To assist with monitoring of expenditure ○ To record ledger transactions where required ○ To ensure income for banking is reconciled to primary records ○ With Academy Business Manager and Central Team ensure all income is recorded on the school's financial accounting system for the various funds ○ To process debtor invoices, where required ○ To complete bank reconciliations through the financial accounting system ○ To assist the Academy Business Managers where required with queries relating to errors/discrepancies, bank reconciliation and other financial matters

General	<ul style="list-style-type: none"> ○ To participate in the performance and development review process, taking personal responsibility for identification of learning, development and training opportunities in discussion with line manager. ○ To comply with individual responsibilities, in accordance with the role, for health & safety in the workplace ○ Ensure that all duties and services provided are in accordance with the School's Equal Opportunities Policy ○ The Vine Trust Board is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share in this commitment ○ The duties above are neither exclusive nor exhaustive and the post holder may be required by the Chief Operating Officer to carry out appropriate duties within the context of the job, skills and grade
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Person Specification Central Processing Supervisor	Detail	Examples
Qualifications & Experience	Specific qualifications & experience	Demonstrate relevant experience in financial management and accounting Educated to NVQ level 3 or equivalent
	Knowledge of relevant policies and procedures	Working knowledge of financial school policies and procedures
	Literacy	NVQ Level 3 in English or equivalent
	Numeracy	NVQ Level 3 in Maths or equivalent Ability to undertake financial/budgetary calculations
	Technology	Competency in the use of word processing and wide range of financial and administrative IT packages
Communication	Written	Ability to complete returns, write letters and detailed reports
	Verbal	Ability to exchange complex verbal information clearly, sensitively and accurately
	Languages	Seek support to overcome communication barriers with children and adults
	Negotiating	Ability to negotiate effectively to achieve best outcomes
Working with children	Health & Well being	Understand the importance of physical and emotional wellbeing
Working with others	Working with partners	Establish effective relationships with those working in and with the Academies and Trust
	Relationships	Ability to establish rapport and respectful and trusting relationships with suppliers, Academy leaders and staff
	Team work	Ability to make a distinctive contribution to the work of a team
	Information	Contribute to the development and implementation of effective systems to share and safeguard information
Responsibilities	Organisational skills	Excellent organisational skills Ability to remain calm under pressure
	Line Management	Ability to lead team of Central Processing Assistants
	Time Management	Ability to plan and manage own time effectively
	Accuracy	Demonstrate an ability for accuracy and attention to detail
	Creativity	Demonstrate a highly creative approach to work Ability to resolve complex problems independently
General	Equalities	Demonstrate a commitment to equality
	Health & Safety	Good Understanding of Health & Safety
	Child Protection	Understand and implement child protection procedures

	Confidentiality/Data Protection	Understand and comply with procedures and legislation relating to confidentiality
	CPD	Demonstrate a clear commitment to develop and learn in the role Ability to effectively evaluate own performance and continually improve

Job Title	Academy Finance Assistant
Grade	Band 3 (to mid-point)
Reports to	Academy Business Manager
Liaison with	Vine Processing Team, Vine Central Team, Teachers, support staff, creditors, students, parents.
Job Purpose	<ul style="list-style-type: none"> ○ To assist the Academy Business Manager to accurately maintain the Academy's financial records and produce financial information for key stakeholders as required ○ To provide operational support to the Academy Business Manager in the areas of Health & Safety, Premises and Human Resources ○ To oversee all processes in relation to routine financial transactions within the school including but not exclusively relating to lettings, dinner money, trips and clubs ○ To ensure that all procedures relating to routine transactions are carried out in accordance with the Trust financial regulations, the Academies Financial Handbook, good practice and relevant statutory legislation. All members of support staff are involved in Performance Management and Pay Review.
Duties	<ul style="list-style-type: none"> ○ General To support the Academy Business Manager on matters relating to finance, estates and Health and Safety ○ To attend Finance, Local Governing Body/Local Board meetings in the absence of the Academy Business Manager and/or as required. ○ To support internal/external audit Financial ○ Assist the Academy Business Manager to ensure that the financial transactions in the academy are carried out in an appropriate manner following the Financial Regulations of the Vine Trust ○ Support the Academy Business Manager with the monitoring of the Academy Financial performance and produce relevant information as required ○ To process Academy order requests ensuring that they are correctly coded prior to submission to the Central Processing Team. ○ To assist in the receipt of delivery of goods, received into the Academies, ensuring the Trust Financial Regulations are adhered to and relevant documentation forwarded to the Central Processing Team. ○ To negotiate and monitor annual orders and non-directed service contracts. ○ To process and record sales invoices and other local income onto the Financial Accounting System. ○ To support the Central Processing Team to deal with creditors queries and statements, either by telephone, letter or electronically. ○ To assist with the monitoring of local budgets on the Financial Accounting System.

	<ul style="list-style-type: none"> ○ To distribute relevant reports on a regular basis to budget holders and assist them with regard to the monitoring of their budget and expenditure. ○ To co-ordinate the collection of all local income, including trips, clubs and lettings, from departments and pupils using financial applications and other systems. ○ To record all income for banking and reconciliation to primary records. ○ Filing all relevant documentation. ○ To oversee catering income and ensure that it is recorded on the Financial Accounting System(s) ○ To process debtors invoices for late payments. ○ To assist the Academy Business Manager where required with any queries relating to errors/discrepancies and other financial matters. ○ Delegated responsibilities may be agreed locally the Academy Business Manager, in all instances a documentary record will be kept <p>Health and Safety</p> <ul style="list-style-type: none"> ○ To assist the Academy Business Manager to co-ordinate, monitor and maintain records in relation to Health and Safety. ○ Provide general support and assistance and undertake training as required. ○ To liaise with staff as requested. <p>Premises</p> <ul style="list-style-type: none"> ○ Have delegated responsibility for the management of premises as required by the Academy Business Manager <p>Human Resources</p> <ul style="list-style-type: none"> ○ To assist the Academy Business Manager and in their absence, deal with all administration with regard to the processing of contractual and other staff data. ○ Assist the Academy Business Manager and Academy HR Assistant(s) with recruitment process for new employees. <p>General Administration</p> <ul style="list-style-type: none"> ○ Undertake the daily routine and process associated with maintaining a record of all incoming mail and ensure that the Academy Business Manager is updated. ○ Assist with photocopying and reproduction facilities. ○ Secretarial assistance to the Academy Business Manager ○ Telephone reception of incoming calls to the Academy Finance Office including taking messages ○ Filing and maintaining of office records and responsible for archiving. ○ ○ Such other duties of an administrative nature as may be required by the Academy Business Manager. ○ ○ Any reasonable request made by the Academy Business Manager. ○ Health and physical capacity for the post.
General	<ul style="list-style-type: none"> ● To participate in the performance and development review process, taking personal responsibility for identification of learning, development and training opportunities in discussion with line manager. ● To comply with individual responsibilities, in accordance with the role, for health & safety in the workplace

	<ul style="list-style-type: none"> • Ensure that all duties and services provided are in accordance with the School's Equal Opportunities Policy • The Vine Trust is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share in this commitment • The duties above are neither exclusive nor exhaustive and the post holder may be required by the Academy Business Manager to carry out appropriate duties within the context of the job, skills and grade. • All staff have a responsibility for the safeguarding and promotion of well-being of all pupils.
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Person Specification Academy Finance Assistant	Detail	Examples
Qualifications & Experience	Specific qualifications & experience	Demonstrate relevant experience in financial management and accounting Educated to NVQ level 3 or equivalent
	Knowledge of relevant policies and procedures	Working knowledge of financial school policies and procedures
	Literacy	NVQ Level 3 in English or equivalent
	Numeracy	NVQ Level 3 in Maths or equivalent Ability to undertake financial/budgetary calculations
	Technology	Competency in the use of word processing and wide range of financial and administrative IT packages
Communication	Written	Ability to complete returns, write letters and detailed reports
	Verbal	Ability to exchange complex verbal information clearly and sensitively
	Languages	Seek support to overcome communication barriers with children and adults
	Negotiating	Ability to negotiate effectively to achieve best outcomes
Working with children	Behaviour Management	Understand and implement the school's behaviour management policy
	Health & Well being	Understand the importance of physical and emotional wellbeing
	Working with partners	Establish effective relationships with those working in and with the school
	Relationships	Ability to establish rapport and respectful and trusting relationships staff and pupils where appropriate
	Team work	Ability to make a distinctive contribution to the work of a team
Working with others	Information	Contribute to the development and implementation of effective systems to share and safeguard information
	Organisational skills	Excellent organisational skills Ability to remain calm under pressure
	Line Management	Ability to manage and support the work of others
	Time Management	Ability to plan and manage own time effectively

Responsibilities	Creativity	Demonstrate a highly creative approach to work Ability to resolve complex problems independently
	Equalities	Demonstrate a commitment to equality
	Health & Safety	Good Understanding of Health & Safety
	Child Protection	Understand and implement child protection procedures
General	Confidentiality/Data Protection	Understand and comply with procedures and legislation relating to confidentiality
	CPD	Demonstrate a clear commitment to develop and learn in the role Ability to effectively evaluate own performance and continually improve

Job Title	Central Processing Assistant
Grade	Band 2 (max)
Reports to	Central Processing Supervisor
Liaison with	Academy Finance Manager Trust Finance and Operations Managers
Job Purpose	To provide financial support to the schools within the Vine Trust
Duties	<ul style="list-style-type: none"> ○ Completion and processing of orders and requisitions using the Trust Financial Accounting Systems. ○ Assisting with Academy and Supplier queries, as and when required by telephone and e-mail. ○ Verify delivery of goods and enter details into the Trust Financial Accounting Systems ○ Enter invoices into the Trust Financial Accounting Systems ○ Prepare invoices for payment ensuring that delivery notes and invoices match with authorised orders. ○ Check suppliers' statements, as and when received. ○ Prepare documentation for intra-company recharges ○ Comply with the Trust Financial Regulations ○ Monitor and action enquiries and instructions made via designated finance mailboxes ○ Identify and liaise with suppliers ○ Enter income/expenditure onto relevant systems, as appropriate ○ Undertake document scanning and filing, as and when required ○ Keep the inventory updated on relevant systems
General	<ul style="list-style-type: none"> ○ To participate in the performance and development review process, taking personal responsibility for identification of learning, development and training opportunities in discussion with line manager. ○ To comply with individual responsibilities, in accordance with the role, for health & safety in the workplace ○ Ensure that all duties and services provided are in accordance with the School's Equal Opportunities Policy ○ The Vine Trust Board is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share in this commitment ○ The duties above are neither exclusive nor exhaustive and the post holder may be required by the Chief Operating Officer to carry out appropriate duties within the context of the job, skills and grade

Person Specification	Detail	Examples
Central Processing Assistant		
Qualifications & Experience	Specific qualifications & experience	Experience of a financial support role NVQ level 1 or equivalent
	Knowledge of relevant policies and procedures	General understanding of financial policies and procedures
	Literacy	Basic reading and writing skills
	Numeracy	Ability to count and undertake basic calculations
	Technology	Ability to use a range of financial and administrative IT packages
Communication	Written	Ability to complete inventories and returns accurately
	Verbal	Ability to exchange verbal information clearly and accurately
	Languages	Seek support to overcome communication barriers
	Negotiating	Ability to negotiate effectively to achieve best outcomes
Working with others	Working with partners	Establish effective relationships with those working in and with the Academies and Trust
	Relationships	Ability to establish rapport and respectful and trusting relationships with staff and suppliers
	Team work	Ability to make a distinctive contribution to the work of a team
	Information	Contribute to the development and implementation of effective systems to share and safeguard information
Responsibilities	Organisational skills	Good organisational skills Ability to remain calm under pressure
	Line Management	N/A
	Time Management	Ability to plan and manage own time effectively
	Accuracy	Demonstrate an ability for accuracy and attention to detail
	Creativity	Demonstrate a creative approach to work
General	Equalities	Demonstrate a commitment to equality
	Health & Safety	Basic understanding of Health & Safety
	Child Protection	Understand and implement child protection procedures
	Confidentiality/Data Protection	Understand and comply with procedures and legislation relating to confidentiality
	CPD	Demonstrate a clear commitment to develop and learn in the role

Job Title	Academy HR Assistant
Grade	Band 2
Reports to	Academy Business Manager(s)
Responsible for	N/A
Liaison with	Central Team, Academy Business Manager(s)
Job Purpose	To provide confidential secretarial and administrative support and to assist the smooth running of the HR Office
Principal Accountabilities	N/A
Duties	To provide confidential secretarial and administrative support to the Academies including the production of letters, documents and reports

	<p>To assist the smooth running of Academies by handling correspondence (internal mail, post, fax, etc) and using initiative to deal with telephone calls</p> <p>To assist in the recruitment process including preparing interviewer packs, booking rooms and filing of interview paperwork as required</p> <p>To undertake pre-employment checks including seeking references, medical clearances and Disclosure and Barring Service (DBS) applications.</p> <p>To maintain the electronic data management system(s) (personnel files) for the Academies including daily scanning of correspondence and documentation in relation to personnel files</p> <p>To assist with maintaining the HR database(s) and other HR record systems</p> <p>To provide support to the Central Team and Academy Business Manager.</p> <p>To maintain confidentiality and comply with current Data Protection Policies at all times</p>
General	<ul style="list-style-type: none"> ○ To participate in the performance and development review process, taking personal responsibility for identification of learning, development and training opportunities in discussion with line manager. ○ To comply with individual responsibilities, in accordance with the role, for health & safety in the workplace ○ Ensure that all duties and services provided are in accordance with the School's Equal Opportunities Policy ○ The Diocese of Chelmsford Vine Schools Trust is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share in this commitment. ○ The duties above are neither exclusive nor exhaustive and the post holder may be required by Academy Business Manager(s) to carry out appropriate duties within the context of the job, skills and grade.

Person Specification Academy HR Assistant	Detail	General Examples
Qualifications & Experience	Specific qualifications & experience	Experience of working in an office environment (E)
	Knowledge of relevant policies and procedures	Knowledge of education sector (D)
	Technology	Ability to use Microsoft Office including Word, Excel and Outlook or equivalent (E) Ability to use databases and experience of data entry (D)
Communication	Written	Ability to write letters and emails (E)
	Verbal	Ability to use initiative to deal with telephone calls and staff queries (E)
Working with others	Team work	Work effectively as part of a team (E) Ability to work independently (E)
Responsibilities	Organisational skills	Ability to be proactive and prioritise work (E)

General	Confidentiality/Data Protection	Understand and comply with procedures and legislation relating to confidentiality and Data Protection (E)

17. Financial Impact

Total Cost of Current Structure	Total Cost of Proposed Structure	Difference
£671,574.44	£586,790.59	£84,783.85

18. Timetable

Date (<i>working weeks</i>)	Actions	Comments
By end of week 1 7 th September 2018	CEO to prepare case to Directors – prepare draft consultation document (including business case and appendices)	
By end of week 3 21 st September 2018	Directors’ meeting. CEO to discuss with directors the need to restructure and/or reduce the number of staff including outlining likely consequences for staff/MAT/budget. Directors to consider draft documents. Directors to formally declare a potential redundancy situation.	
By end of week 4 28 th September 2018	Commence formal consultation. Issue consultation document to staff. Invite staff to consultation meeting (with right to be represented). Commence consultation with trade unions	Wednesday 31 st October 2018 - Chelmsford
By end of week 7 19 th October 2018	Formal consultation meeting with trade union representatives Monday 15 th October 2018	
By end of week 9 2 nd November 2018	Formal consultation meeting with staff and trade union representatives Wednesday 31 st October 2018	
By end of week 10 9 th November 2018	End of formal consultation period (although consultation will continue throughout)	
By end of week 11 16 th November 2018	Directors meet to consider any responses received during consultation period. Directors decide whether to proceed with proposed relocation. Inform staff of Directors’ decision. Respond to any written representations made by staff/trade unions in writing	
By end of week 12 23 rd November 2018	Initial deadline for receipt of applications for slotting.	

	Initial deadline for receipt of applications for new positions. Initial deadline for receipt of applications for voluntary redundancy.		
By end of week 13 30 th November 2018	Redundancy Each member of staff invited to complete Vine Slotting Form, identifying their skills compared to rolls within the new structure.	Restructuring/Slotting Each member of staff notified whether : 1. 'Slotted' into directly comparable post 2. Offered alternative employment 3. Neither 'slotted' nor offered alternative employment Staff in category 3 invited to apply for vacant posts in new staff structure.	Alternative employment will not be available in all situations.
By end of week 13 30 th November 2018	Completed Vine Slotting Forms to be returned to COO	Staff in category 2 to indicate whether alternative employment is accepted. Staff in category 3 to return applications for posts in new structure.	
By end of week 15 14 th December 2018	Selection process undertaken	Interviews held for staff in category 3 and staff in category 1 where a competitive interview is necessary.	
By end of week 15 14 th December 2018	Individual/s notified verbally that they have been identified as being made redundant. Meeting with other staff to let them know an individual has been selected but not whom.	Each member of staff notified of outcome of their interview(s)	
By end of week 17 11 th January 2019	The individual/s selected for redundancy are invited to a formal meeting and provided with relevant papers		
By end of week 19 25 th January 2019	Formal redundancy meeting(s) held		
By end of week 20 1 st February 2019	Reserve date for formal redundancy meeting(s)		
By end of week 21 8 th February 2019	Formal notice of dismissal issued by CEO following redundancy meeting (if appropriate)		Deadline for notice of dismissal to be received : Dismissal on 30 th April 2019

By end of week 22 15 th February 2019	Employee lodges appeal against Decision	
As soon as possible	Dismissal appeal hearing	
30 April 2019	End of employment	

THROUGH CONSULTATION WITH STAFF AND TRADE UNIONS IT IS VERY MUCH HOPED THAT AGREEMENT WILL BE REACHED AND THAT COMPULSORY REDUNDANCY WILL BE AVOIDED

19. Support

If you feel very anxious about the proposed change you can speak to your trade union representative or the COO.

Alternatively you can get advice from Essex Wellbeing Service, the Trust's confidential counselling service as follows:

For any general enquiries - 0333 013 5859 - option 2 and then:

Option 1 for Occupational Health

Option 2 for Staff Counselling Service

20. Trade Union Representatives

Union	Name	Address
GMB	Mark Holland mark.holland@gmb.org.uk Joe Ledgerton gmb2joe@gmail.com	53 Duke Street Chelmsford CM1 1JA Tel 01245 345165 Fax 01245 345129
UNISON	unisoninessex@gmail.com	70 Duke Street Chelmsford CM1 1JA Tel 01245 354044
UNITE	Mark Barter Mark.Barter@unitetheunion.org	Transport House 46-48 New Road Dagenham RM9 6YS Tel 020 8596 9966 Fax 020 8595 7930
ATL	School Level matters should be emailed into info@atl.org.uk Sue Wilson 01279 467081	
NASUWT	Peter Wermter peter.wermternasuwt@yahoo.co.uk Jackie Scannell jackie.scannell@talktalk.net Regional Office: 01284 772300	
NAHT	Branch Secretary – Peter Malcolm petecoi@hotmail.com or mr.malcolm@rayleighprimary.org.uk Regional Officer – Noel Glover noel.glover@naht.org.uk	1 Heath Square Boltro Road Haywards Heath West Sussex RH16 1BL

ASCL (previously SHA)	Nick Binder nicholas.binder@ascl.org.uk Tel: 07712 323442 ASCL helpline: Tel: 0116 299 1122	
NUT	Mr Jerry Glazier ejglazier@aol.com Tel (01702) 207780 Mobile 07774 782614 Fax (01702) 200985 Pauline Price pricep@hotmail.com Agnes Bishop areb@btinternet.com	12 Kilnwood Avenue, Hockley Essex SS5 4SH
VOICE (previously PAT)	Mr Simon Smith Tel 01268 784721 Mobile 07983 485570 Email: simons@sweynepark.com	c/o Sweyne Park School Sir Walter Raleigh Drive Rayleigh Essex SS6 9BZ

21. Application Form / Slotting Form

Please follow the links below

[Slotting form](#)

[Application form](#)

22. Redundancy and Restructuring Policy

Please follow the link below

[Redundancy & Restructuring Policy](#)

23. Relocation Excess Expenses

Please follow the links below

[Excess travelling Expenses Policy](#)

[Excess Travelling Expenses Claim Form](#)