



# Information for applicants: Purchase Ledger Manager

# WELCOME TO THE ESSA FOUNDATION ACADEMIES TRUST

## **All will succeed**

The ethos of Essa is summarised in these three words. It doesn't just refer to our learners. Our Sponsors and our Board of Trustees want all those involved in the Essa journey to succeed.

Our schools need great people in the classrooms but every part of Essa needs people who are prepared to go the extra mile, are passionate about making a difference to the lives of children and young people, love working in teams, are collaborative and generous as colleagues and value the contribution of all parts of our Trust.

The experience of the Covid pandemic has demonstrated how we all have a part to play in making Essa one of the best places of learning for the communities we serve. The challenges of disadvantage which they face can be lightened by the security of having a good school on the doorsteps for their children and one where their life chances will be enhanced and secured.

I hope you will want to be part of the Essa team and help us ensure that 'All will succeed'

Dame Kathryn August, Chief Executive



# THE TRUST

The Essa Foundation Academies Trust currently sponsors two academies:

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

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 October 2021 and judged to be a good school in all areas.

## 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 (October 2021)

'Essa Academy is a community underpinned by a culture of tolerance and respect.'

'Without exception, every pupil who spoke to an inspector said that they are proud to attend Essa Academy.'

'Teachers have high expectations.'

'Across the school, all pupils achieve well.'

'Leaders have created a strong and purposeful learning environment.'



# VISION & VALUES - *All Will Succeed*

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:**

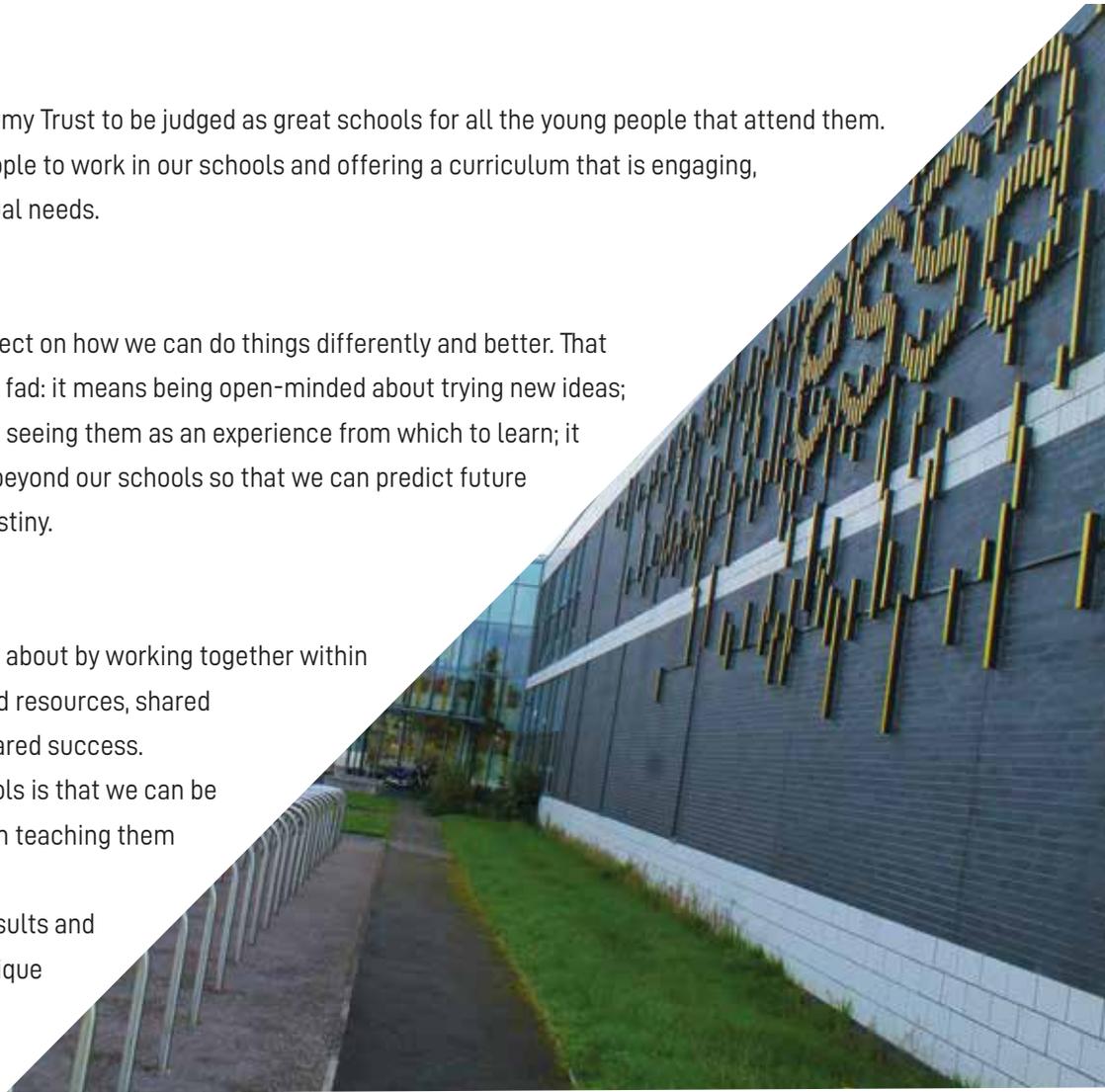
We want the schools within our Academy Trust to be judged as great schools for all the young people that attend them. This means recruiting outstanding people to work in our schools and offering a curriculum that is engaging, challenging and responsive to individual needs.

## **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

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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Essa Foundation Academies Trust are seeking to recruit a dynamic, talented individual with a demonstrated history of successful purchase ledger management. The successful candidate will be joining a unique, supportive, happy central services team and will work alongside dedicated, forward thinking colleagues. We operate with a Finance department of 4 including this role, alongside 2 HR colleagues, so a tight unit with constant communication of any issues to resolve amongst the team.

The successful candidate will be a passionate and inspirational purchase ledger manager with a real desire to build positive relationships across the Trust to support both of our schools, our sports centre, and our supplier relationships. Upholding our high standards and a commitment to achieving excellent results for our key stakeholders, including our students and budget holders, is essential. We offer a hybrid working model for the central services team. For the right candidate, we will offer study support towards a relevant qualification.

Closing date: 6 June

Interviews: 13 June

Start date: Ideally we will be looking for an immediate start, however we may be able to wait a little longer for an exceptional candidate

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## JOB DESCRIPTION

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<b>Post:</b>	Purchase Ledger Manager
<b>Department:</b>	Finance
<b>Responsible to:</b>	Chief Financial Officer
<b>Terms:</b>	Full time, all year round
<b>Hours:</b>	37 hours per week

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*Essa Foundation Academies Trust and all its schools and academies are committed to safeguarding and promoting the welfare of children, young people and vulnerable adults and expects all staff and volunteers to share this commitment.*

### The Role

- Manage the Purchase ledger function for both EFAT and Essa Education.
- Supervise the Finance Administrator
- All monthly bank reconciliations including debit card
- Produce budget reports for the budget holders

### Key Responsibilities

- Full Purchase Ledger function including managing Finance Administrator and assisting in processing purchase orders and invoices
- Ensuring procurement procedures are followed with regards to purchase orders and invoice authorization.
- Arranging payment runs and setting up new suppliers
- Managing expenses claims
- Monitor aged creditors.
- Being the point of contact for suppliers for all relevant enquiries.
- Being the point of contact for the schools for the purchase ordering system, assisting with training budget holders on the purchase ordering system.
- Monitor debit card orders and reconciles monthly statements.
- Perform and Review Supplier statement reconciliations
- Keep up to date, electronic files that will be needed for Year End Audit. (Reconciliations, approvals, remittances, supplier statements etc.)

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

- Raise sales invoices
- Process insurance claims
- Banking of cash and cheques
- Assisting with month end management accounts compilation
- Deal with enquiries in finance in a timely and professional manner.
- Carry out other duties as directed by Chief Finance Officer.

**Customer Care**

- To continually review, develop and improve systems, processes and services in support of the Trust’s pursuit of excellence in service delivery. To recognise the value of it’s 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 that they are aware of and work within the requirements of all Keeping Children Safe in Education policies, seeking clarity from a member of Senior Leadership if necessary.
- All staff are expected to uphold all EFAT HR related policies.

This job description is current at the time of date shown. It will be reviewed at least annually and in consultation with you, it may be changed by the principal to reflect or anticipate changes in the job commensurate with the grade and job title.

Employee Name .....

Date .....

Signed.....

## PERSON SPECIFICATION

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**Post:** Purchase Ledger Manager  
**Responsible to:** Chief Financial Officer  
**Terms:** Full time, all year round  
**Hours:** 37 hours per week

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### Role Specific Criteria

		Essential	Desirable*
<b>Qualifications and Training</b>		✓	✓
1.	5 GCSEs A*-C including Maths and English, or equivalent	✓	
2.	A Level qualifications, or equivalent		✓
3.	Hold, or have an ambition to complete, a relevant professional qualification		✓
<b>Skills, Knowledge and Experience</b>			
4..	Experience of leading a purchase ledger function	✓	
5.	Ability to build strong positive relationships with colleagues	✓	
6.	Experience of working in an educational environment		✓
7.	Evidence of working within an environment where experiences include taking initiative and self motivation	✓	
8.	Be a confident user of technology	✓	
9.	Excellent communication skills	✓	
10.	Effective team player	✓	

\* In the event of a large number of applicants meeting the essential criteria, the desirable criteria will become essential.

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**The following criteria are applicable to all employees of Essa Foundation Academies Trust**

<b>Personal Attributes</b>			
•	Ability to promote a positive ethos and role model positive attributes	✓	
•	Effective team player	✓	
•	Sensitive to the needs of others	✓	
•	Good listening, oral and numeracy skills	✓	
•	Ability to successfully organise time and successfully work to deadlines	✓	
•	Awareness of own development needs	✓	
•	Person of integrity	✓	
•	A good sense of humour	✓	
<b>Valuing Diversity</b>			
•	Listen, support and monitor the diverse contributions made to service development without prejudice	✓	
•	Challenge behaviours and processes, which do not positively advance the diversity agenda whilst being prepared to accept feedback about own behaviour	✓	
•	Recognise people's strengths, aspirations and abilities and help to develop their potential. Understand how Valuing Diversity can improve our ability to deliver better services and reduce disadvantage	✓	
<b>Customer Care</b>			
•	Support school and sports centre staff, including budget holders, to effectively execute the approved procurement policies	✓	
•	Key point of contact for the Trust's suppliers	✓	
<b>Developing self and others</b>			
•	Coach and mentor others and be willing to share learning and encourage others to do the same	✓	
•	Listen to others and respond to their needs	✓	

•	Apply a range of development activities to develop and train staff to effectively execute approved purchasing and related policies	✓	
•	Strive for improvement and take responsibility for own development	✓	
•	Be self-confident and lead by example	✓	
<b>Work related circumstances</b>			
•	Essa Foundation Academies Trust and all its schools and Academies are committed to safeguarding and promoting the welfare of children, young people and vulnerable adults and expects all staff and volunteers to share this commitment.	✓	
•	All staff will ensure that they are aware of and work within the requirements of all Keeping Children Safe in Education policies, seeking clarity from a member of Senior Leadership if necessary.	✓	

## 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 pages of our Academy websites:

Essa Academy <https://www.essaacademy.org/vacancies>

Essa Primary <http://www.essaprimarv.org/current-vacancies>

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: Dame Kathryn August, CEO, EFAT, Lever Edge Lane, Bolton, BL3 3HH. Telephone: 01204 333 222 or E-Mail: [hr@efatrust.org](mailto:hr@efatrust.org)**