

Estates & Compliance

Candidate Pack

Salary: MAT 5 (SCP 11 £28,142
– SCP 17 £31,022)

Contract Type: Permanent
contract 37 hours per week

Location: Halsnead Primary
School: Pennywood Drive
Whiston, Prescot, Merseyside,
L35 3TX.



THE
Heath
Family
Trust



About the Trust

Our work at The Heath Family Trust is rooted in our mission, our values and in a commitment to giving our pupils the best start in life. We collectively hold ourselves and each other to the highest standards. You will thrive in an environment that values **clarity** in communication and purpose, fosters **collaboration** across all levels, and champions a culture of **accountability**.

Academic rigour is our priority. We achieve this by ensuring our work is thorough and of the highest intellectual integrity.

✔ WHY WE EXIST: A SHARED PURPOSE

To empower our children to overcome barriers, be able to compete with the best, and shape the future.

✔ HOW WE BEHAVE: THE HEATH FAMILY VALUES

With kindness: we look out for each other.

With integrity: we do the right thing.

With tenacity: we do what it takes.

✔ WHAT WE DO

We lead schools in the North West to maximise attainment and nurture confident, resilient and compassionate individuals.

We Offer:



- ✓ An opportunity to work in a values driven organisation and be part of a welcoming and dedicated team
- ✓ Support and training so that you can flourish in your role
- ✓ Recognition of the importance of a work life balance and employee wellbeing
- ✓ Car lease scheme
- ✓ Cycle to work
- ✓ Appropriate pension scheme
- ✓ Employee Assistance Programme (EAP)



Estates & Compliance Officer

Salary

MAT 5 (SCP 11 £28,142 – SCP 17

£31,022)

Hours

37 hours per week

Contract Type

Permanent

Closing Date

Wednesday 29th July 2026

We are looking to appoint a dedicated Estates & Compliance Officer to provide administrative and operational support to the Trust Infrastructure function.

The Estates and Compliance Officer will be responsible for maintaining accurate records, supporting compliance management processes, coordinating contractor documentation and assisting with the effective operation of the Trust's estates systems.

The postholder will play a key role in ensuring statutory compliance records, project information, quotations, purchase orders and operational documentation are maintained accurately and efficiently.

The role will support the Trust Estates Manager and Infrastructure team in delivering effective estates, compliance and IT services across the Trust.

Key Responsibilities:

Compliance Administration

- Administer and maintain the Trust's compliance management systems, including iAM Compliant.
- Upload and maintain statutory inspection reports, certificates and compliance documentation.
- Monitor compliance actions and deadlines, ensuring appropriate follow-up takes place.
- Maintain accurate records relating to statutory compliance activities.
- Support the preparation of compliance reports and information requests.
- Assist in ensuring schools maintain accurate compliance documentation.

Contractor and Supplier Administration

- Maintain contractor records and documentation.
- Ensure contractor insurance, qualifications and safeguarding information are current.
- Coordinate contractor onboarding documentation where required.
- Maintain approved contractor and supplier records.
- Assist with obtaining quotations and supporting procurement activities.

Job Description

Operational Support

- Provide administrative support to the central Infrastructure Team and the wider central team as required.
- Assist with scheduling inspections, servicing and maintenance activities.
- Coordinate meetings, site visits and contractor appointments.
- Support schools with operational administration relating to estates and compliance matters.
- Assist in monitoring completion of operational actions and projects.

Financial Administration

- Raise and process purchase orders in accordance with Trust procedures.
- Monitor and maintain records relating to estates expenditure.
- Assist with invoice reconciliation and contract administration.
- Support budget monitoring activities as required.
- Maintain records relating to quotations and approved works.

Systems, Reporting and Record Management

- Maintain accurate electronic and paper filing systems.
- Prepare routine reports and performance information.
- Produce compliance, contractor and project tracking reports.
- Ensure records are retained in accordance with Trust policies and statutory requirements.
- Support the development and improvement of administrative processes.

Customer Service and Communication

- Act as a professional first point of contact for schools, contractors and external stakeholders.
- Respond to enquiries and requests for information in a timely manner.
- Build positive working relationships with school staff and operational teams.
- Support effective communication between schools and the central estates function.

General Responsibilities

- Promote and uphold the Trust's values and ethos.
- Ensure compliance with safeguarding, GDPR, health and safety and Trust policies.
- Participate in training and professional development activities.
- Undertake any other duties commensurate with the grade and responsibilities of the post.

The postholder will be required to travel to any schools within The Heath Family (NW). Flexibility may occasionally be required to support operational priorities.

This job description is not necessarily a comprehensive definition of the post. It will be reviewed at intervals, and it may be subject to modification or amendment at any time after consultation with the holder of the post.

Person Specification

PERSON SPECIFICATION – Estates & Compliance Officer		
CATEGORY/ITEM	ESSENTIAL	DESIRABLE
Qualifications, Knowledge & Experience		
GCSE Grade C/4 or above (or equivalent) in English and Mathematics	X	
Business Administration qualification or equivalent.		X
Evidence of relevant administrative experience.	X	
Experience working in an administrative or business support role.	X	
Experience maintaining records and databases.	X	
Competent use of Microsoft 365 applications, particularly Excel, Word and Outlook.	X	
Experience handling confidential information.	X	
Experience coordinating multiple activities and priorities.	X	
Understanding of administrative processes and record management.	X	
Knowledge of customer service principles.	X	
Understanding of confidentiality and data protection requirements.	X	
Experience within an academy trust, school or public sector environment.		X
Experience of purchase order processing and financial administration.		X
Experience using compliance management systems such as iAM Compliant.		X
Experience supporting estates, facilities or compliance functions.		X
Understanding of estates compliance requirements.		X
Understanding of procurement and contractor management processes.		X
Skills, Abilities and Personal Qualities		
Excellent organisational skills and attention to detail.		
High level of accuracy in record keeping and data entry.		
Strong customer service and relationship-building skills.		
Ability to work independently and use initiative.		
Ability to prioritise workload effectively.		
Strong written and verbal communication skills.		
Suitability to work with children		
Enhanced DBS clearance is required for this position	X	

How to Apply

Applicants must have relevant qualifications and experience related to this role, please ensure that you meet the person specification before applying.

We are committed to equality of opportunity for all staff and applications from individuals are encouraged regardless of age, disability, sex, gender reassignment, sexual orientation, pregnancy and maternity, race, religion or belief and marriage and civil partnerships.

Appointment is subject to a satisfactory enhanced disclosure from the Disclosure and Barring Service and references. The Trust is committed to safeguarding and promoting the welfare of children and young people and expects all staff to share this commitment.

We ask that you do not send CVs. Please email your completed application to recruitment@theheathfamily.org.uk

Application closing date: Wednesday 29th July 2026

Shortlisting Date: Thursday 30th July 2026

Interview Date: W/C 3rd August 2026