

Chief Financial Officer





CHIEF FINANCIAL OFFICER

Grade 14 (Local Government Service, £61,191 - £65,564)

Required September 2023

(Or earlier if a start date can be negotiated)

This is an exciting opportunity for a committed, dynamic, and innovative finance leader. Trustees are looking to appoint a Chief Financial Officer to this newly formed MAT (June 2023), initially with two large secondary schools. As part of this role the postholder will work closely with the Chief Executive Officer (CEO) of the Trust, as well as the business and finance leads in both schools.

The successful candidate will play a significant role in the strategic leadership and future development of the Trust. You will work to support the CEO in all aspects of financial management, including the development, implementation and maintenance of financial procedures and systems, and ensuring that all legal and governance requirements meet the requirements of the Academy Trust Handbook.

Candidates should have a strong, relevant background in finance and be able to demonstrate successful experience in budget planning, monitoring, and delivery as well as the production of final accounts, demonstrating value for money through the principles of economic, efficient, and effective use of resource. Experience in an education setting, particularly a single or multi-academy trust, is beneficial but is certainly not essential.

Completed application forms (from the relevant advertising platform, also available via Soar Valley College's website) should be submitted by **9am 5 June 2023.**

Interviews will be held on 13 and 14 June 2023.

Aspire Learning Partnership shares a committed to safeguarding and promote the welfare of Children and young people. Our commitment is underpinned by robust processes and procedures that seek to maximise opportunity, minimise risk and continuously promote a culture that embraces the ethos of safeguarding amongst our workforce.

This post is exempt from the Rehabilitation of Offenders Act 1974 and subject to a DBS check for the successful applicant.



May 2023

Dear Applicant,

Chief Financial Officer

Thank you for your interest in the post of Chief Financial Officer with Aspire Learning Partnership. This is a hugely important appointment for us, as we start this journey as a multi-academy trust, an exciting new venture initially based in the city of Leicester.

Aspire Learning Partnership initially comprises of two large secondary schools, with over 3000 students, and with the intention to expand to other schools and phases. The Trust has been a long time in the making and has been established with real thought given to the purpose, the vision, values and ethos, information about which is included in this pack. It grew out of one school supporting another, and also a desire to establish something a bit different for the city. We very much aim to have a mutually supportive culture, one where we all learn from each other, and which also allows schools to retain their individuality and to reflect their particular communities - and I am proud to say that there is already demonstrable success!

To date, in the developmental phase of the Trust, the finance policies and procedures have been established by the excellent finance teams in the two schools but, as we look to the future and growth, this new appointment is an incredibly important one for us. It offers a great opportunity for the successful applicant to develop the role, systems, and structures to meet the needs of the Trust, in line with our educational values and ethos.

I hope the information provided in the Applicant Pack is useful; visits and informal discussions about the requirements of the role are also welcomed should you wish to do so; please contact me via Smita Stone, PA, on sstone@soarvalley.leicester.sch.uk or 0116 2699441.

I do hope we have sparked your interest in this post and look forward to receiving and reading your application.

Yours sincerely,

Julie Robinson CEO

Trust Information

Our Trust website is currently under construction; please find below a summary of information about our values.

Welcome to our Trust, a new partnership of schools in Leicester forming in June 2023. The name, Aspire Learning Partnership, came after extensive discussion, and we believe it perfectly sums up what we are about, being specifically chosen to reflect our core values.

'ASPIRE to be the best you can be' is the core message for our Trust, and for everyone involved with it in any way. Our aim is for all to have high aspirations, to want to succeed and constantly improve, and then to do so!

LEARNING is at the heart of all we do, transforming individual lives and the success of our communities.

Our schools support all children to attain the highest standards possible in the academic, but also much more. Our schools provide rich opportunities for children to be successful and prepare them for their next steps.

Our biggest resource is the people working in our schools. They are highly valued for the contribution each one makes and will be supported to continue to learn and develop in their role.

We believe that **PARTNERSHIP** working is the key to significant and sustained change and leads to the highest levels of achievement and for all and excellence in all aspects of our work. Each school serves a unique community and will retain its individuality whilst working collaboratively, supporting, and challenging others to constantly improve. Schools and the Trust are led with integrity and mutual respect for all.

Although in our infancy, we have been working behind the scenes on the Trust for several years and have taken the time to make sure it is set up well. We have recruited an excellent Board of Trustees, all with the 'right' ethos, and who will ensure the Trust remains committed to its values.

We are starting small, with two secondary schools – although that is already over 3000 students! Our ambition is to be cross-phase, working with those across the primary, secondary, and possibly tertiary sector too. For now, the two secondary schools at the start of this journey are:

Soar Valley College - An 11-16 Ofsted rated Outstanding school, with 1560 students on roll and excellent outcomes at Key Stage 4, Soar Valley prides itself on its ethos of 'effort is everything'.

www.soarvalley.leicester.sch.uk

The City of Leicester College – an 11-18 school, currently Requires Improvement in Ofsted terms, but with rapid improvement over the last two to three years, and now a Progress 8 figure of +0.5 at Key Stage 4 and excellent results post-16 too.

www.cityleicester.co.uk

Job Description Chief Financial Officer

Job Title	Chief Financial Officer	Department: Senior Leadership Team	
Salary	LGS Grade 14	Report to:	Chief Education Officer
	Range: £61,191 - £65,564		(CEO) and Trust Board
Weeks per	52 weeks (34 days annual	Hours per	37 hours per week
year:	leave, rising to 39 after 5	week:	
	years, including Bank Holidays)		

Safer recruitment statement:

Aspire Learning Partnership shares a committed to safeguarding and promotes the welfare of children and young people. Our commitment is underpinned by robust processes and procedures that seek to maximise opportunity, minimise risk and continuously promote a culture that embraces the ethos of safeguarding amongst our workforce. This post is exempt from the Rehabilitation of Offenders Act 1974 and subject to a DBS check for the successful applicant.

Overall purpose of the role:

The post holder will be responsible for the strategic management of the Trust finances and overall probity and sustainability.

As CFO the post holder will ensure that the finance and audit requirements outlined within the Academies Trust Handbook (ATH) Master and Supplemental Funding Agreements, Accounts Direction, Statement of Recommended Practices (SORP) of the Charities Commission and the Trust financial policies and scheme of delegation are fully met and maintain financial probity across the Trust.

The post holder will be responsible for the consolidation of the Trust accounts, provide accurate, timely and reliable financial information in the form of detailed reports for the Trust Board and prepare all statutory financial returns for submittal to the ESFA.

This is a key role for the schools within the Academy Trust as it is the first point of contact and support for advice on financial and management accounts, budgets, payroll, procurement, and other finance related matters. It will be vital that the postholder has a significant profile within the schools, supporting the business leads and finance staff within the Trust's schools.

It is anticipated that there will be a higher demand for work during school term time with an ongoing need for work in the school holidays. There will be a requirement to attend events such as training and meetings that may take place outside normal working hours. The post holder will be required to travel to and from various sites and flexibility will be needed to accommodate the demands of the post.

As part of this role the post holder will work closely with the Chief Executive Officer (CEO) of the Trust, as well as the business leads in schools.

All staff at Aspire Learning Partnership are required to:

- 1. Uphold and promote the Trust's vision and aims.
- 2. Support and contribute to the achievement of our students academically and pastorally.
- 3. Support and contribute to the school's responsibility for safeguarding students.
- 4. Undertake professional training to enhance personal development and job performance.
- 5. Comply with all Trust policies and procedures including safeguarding, child protection, health, safety and security, confidentiality, and data protection including GDPR.
- 6. Maintain high professional standards of attendance, punctuality, appearance, conduct and positive relationships with all pupils, parents/carers, colleagues, and trustees and governors, treating everyone with dignity and respect.
- 7. Share best practice, expertise, and skills with others.

All senior leadership staff in the Trust are required to:

- 1. Inspire, challenge and support others to enable them to be the best they can be.
- 2. Model and drive the Trust's vision, values, and expectations to have a significant impact on students' life chances.
- 3. Be an outstanding leader and role model for all.
- 4. Have a proven track record of leadership at senior level.
- 5. Nurture a culture of professional development.
- 6. Have the ability to project presence and articulate our vision to all members of the Trust's community.
- 7. Demonstrate high level inter-personal skills to work successfully with a wide range of audiences.
- 8. Show a commitment to modelling the highest professional standards.
- 9. Have a proven track record of change management to secure improved academic standards.
- 10. Be committed to equality of opportunity and inclusive education.
- 11. Have the energy, enthusiasm, personal warmth, and humour to remain resilient and deliver the above.

Principle responsibilities and duties:

STRATEGIC:

- To support the CEO in the strategic leadership of all aspects of financial management of the school, including the development, implementation and maintenance of school financial procedures and systems ensuring that all legal and governance requirements detailed in the Academy Trust Handbook are met.
- 2. To support the CEO in the formulation, monitoring and evaluation of the Trust Development Plan and financial strategy that ensures viability of the Trust.
- 3. Responsible for the preparation and delivery of short, medium, and long term financial planning including costing out school improvement plans.
- 4. To support in education success and stability through integrated curriculum and financial planning (ICFP).

- 5. To lead on the development and implementation of relevant Trust policies, ensuring compliance with all relevant statutory procedures.
- 6. Responsibility for the preparation and submission of Condition Improvement Funding (CIF) bids to the ESFA.
- 7. To oversee and advise on all new joint procured contracts and services for the Trust including materials, cleaning, catering, grounds maintenance etc. in order to secure best value for the Trust.
- 8. To maintain the board's risk register, monitoring the ongoing financial and reputational risks and advising the board as appropriate on the risks associated with any new ventures.
- 9. To ensure that all relevant, statutory reporting linked to the post on behalf of the Trust is accurate, compliant, and timely.
- 10. To ensure that the Trust complies with statutory requirements on data protection (GDPR) and the Freedom of Information Act
- 11. To support and advise the CEO in the line management of support staff in regard to finance across the Trust.
- 12. To ensure that the Trust complies with statutory requirements relating to employment law.
- 13. To support the CEO in generating continual streams of new income through effective bid-writing, partnerships, joint ventures, and business development including potential funding opportunities to allow expansion and/or development of existing buildings to maximise income generation.
- 14. To develop effective relationships with staff, /students/pupils, parents, local businesses, and stakeholders across the entire Trust.
- 15. Responsibility for Business Continuity planning for all aspects of the Trust's business, ensuring there are adequate and appropriate mechanisms in place for the management of risk and disaster recovery.

FINANCE:

- To develop and oversee all financial policies and procedures in the Trust to ensure compliance with the Academies Trust Handbook and Charities Commission's Statement of Recommended Practices (SORP) and ESFA's Accounts Direction.
- 2. To provide professional advice and support to the Trust on all aspects of finance and business management.
- 3. To attend all board meetings and to present detailed management accounts, regular returns and annual accounts and financial statements.
- 4. To prepare and submit all financial returns in a timely and accurate manner including financial records for the auditors and returns to Companies House.
- 5. To develop and oversee the Trust's risk management strategy and procedures to ensure that key business risks are identified, assessed, and managed.
- 6. To support the CEO and consult with Senior Leadership Team (SLT) to prepare a realistic and balanced budget.
- 7. To present for approval by the Trust Board the annual budget.
- 8. To oversee and advise the work of the audit and risk committee ensuring compliance with the Academies Handbook and funding agreement.
- 9. Liaising with the managers of the Risk Protection Arrangement (RPA) regarding training and risk monitoring.

- 10. Responsible for the financial audit arrangements on behalf of the Trust.
- 11. To monitor closely the spending plans of the Trust and hold all budget holders to account and making any subsequent recommendations to the CEO and Trustees as required.
- 12. Monitor service level agreements and contracts ensuring efficiency, effectiveness and value for money are achieved.
- 13. To ensure that the Trust completes all relevant period-end procedures and that timely financial monitoring reports are presented to the governing bodies and in line with financial policy.
- 14. To manage the funding agreements to ensure compliance with Education Funding Agency requirements (ESFA) including the effective management of all Trust Bank accounts.
- 15. Responsibility for managing the Trust's VAT status and pay VAT liabilities/claims and advising on the financial implications of charitable status with respect the current and any future legislation.
- 16. To be the point of contact with the DFE/ESFA and other agencies regarding grant applications, gifts, and donations.
- 17. To research and bid for additional funding to DfE or other such organisations on behalf of the Trust, including the Condition Improvement Fund.
- 18. To be responsible for seeking professional advice on Insurance and advising the Trustees on the appropriate insurances for the Trust.
- 19. Ensure the implementation of the approved insurance schemes and handling any claims that arise including liaison with appointed loss adjustors,
- 20. To manage the effective purchasing and procurement of any Trust wide products and services and negotiate, manage, and monitor contracts, tenders, and agreements for the provision of support services, to include school improvement, payroll, audit, legal, health and safety, IT, grounds maintenance, catering, cleaning, insurance, facilities management.
- 21. To support and advise on the Trust's asset management planning including lettings, income generation from the use of buildings and expansion and development of existing sites.
- 22. Support the CEO and Senior Leadership team to complete integrated curriculum and financial planning (ICFP).
- 23. Carry out on an annual basis an appropriate benchmarking exercise and present to the CEO and Trust Leadership Team including identified findings and potential recommendations. The benchmarking report with recommendations and actions will be presented to Trustees.
- 24. Support the Trust Special Educational Needs Co-ordinator (SENDCo) relating to financial and operational matters relating to the Accessibility Plan.
- 25. To ensure census returns to the Department for Education (DfE) are completed on time.

PERSONNEL MATTERS:

 To provide advice to Trustees on financial aspects of all HR matters relating to salaries, expenses, sickness, leave, maternity procedures, redundancy and other matters of discipline and dismissal.

- 2. To advise Trustees on the policies to comply with employment legislation concerning employment protection, equal pay, sex discrimination, ethical and social requirements and the implementation and monitoring of these policies in the Trust.
- 3. To ensure that the Workforce Census, as required by the DfE is completed accurately and with the statutory deadlines.
- 4. Lead on the provision of a comprehensive payroll service including the including the management of pension schemes and associated services, liaising with the HR Provider as required.
- **5.** Actively build professional networks locally and nationally, ensuring that the Trust has reach and presence.

LEGAL MATTERS:

- 1. Liaise with the Trust solicitors regarding any claims, contract documents or other legal matters affecting Trust.
- 2. Lead on the due diligence process associated with conversion across finance functions and to support the CEO in the production of the due diligence report and recommendations to the Trust Board.

This job description is current at the date shown, but following consultation with the post holder, may be changed by the CEO to reflect or anticipate changes in the job which are commensurate with the salary and job title. It allocates duties and responsibilities but does not direct the amount of time to be spent on carrying them out. The above responsibilities are subject to the general duties and responsibilities contained in the statement of conditions of employment.

Last updated	May 2023		
Signed:			
Print Name		Date:	

PERSON SPECIFICATION							
Job title:	Chief Financial Officer						
CRITERIA				Essential/ Desirable			
Personal	A passionate belief in the Trust	Е					
qualities & professional	A strong commitment to inclusion and overcoming barriers to learning and achievement						
dispositions	A commercially astute, articulate, technically strong, dynamic, insightful, and influential leader with the ability to operate at both strategic and operational levels						
	Strongly self-motivated and demonstrates personal resilience, persistence, and perseverance						
	Exceptional levels of personal integrity, discretion, honesty, reliability, and self-awareness – following the seven principles of public life						
	Strong intellect underpinned by a clear moral compass, instinct, and intuition						
	Conscientious and diligent work ethic						
	High standard of personal presentation with an excellent attendance and time-keeping record			E			
	Exacting standards, with high levels of attention to detail and accuracy			Е			
	Creative, constructive, insightful, and innovative approach to problem solving			E			
	Commitment to support the Trust's agenda for safeguarding and equality and diversity			E			
	Ability to work under pressure, prioritising workloads to meet specified deadlines, in a situation with frequent interruptions			E			
	Commitment to the pursuit of continuous professional development by oneself and other			E			
Qualifications	Qualified accountant (accountancy qualifications from professional bodies such as the ICAEW, ACCA, CIMA or CIPFA (including CIPFA qualification developed in partnership with ISBL)) Candidates not holding a formal accountancy qualification would be encouraged to gain an appropriate qualification						
	Level 5 Diploma in School Business Management or equivalent qualification						
	Experience of negotiating cont	D					
Experience & knowledge	A clear understanding of how to outcomes of the Trust.	E					
	At least 2 years of experience working in finance office environment or equivalent role.						
	Experience of working in an ed	Е					
	Knowledge of legal, regulatory, ethical, and social requirements and experience of ensuring compliance						
	Experience of risk management						
	Experience of planning, leading change	E					
	Experience of successfully leading teams of people and managing staff performance and development						
	Knowledge of formal tendering processes						
	Experience of generating income			D			

Guidance Notes for Applicants

These guidance notes are designed to provide you with information on completing your application form and on our recruitment process and associated policies. You should read all the guidance notes prior to completion of the application form. If you would like any further advice regarding the vacancy or the recruitment process, please contact the Trust directly.

When completing the application form, please refer to the following information:

- **Job Description** this describes the main duties and requirements for the post and provides an understanding of the role.
- **Person Specification** this describes the skills, knowledge and experience required for the post
- Advertisement this will give you brief details of the job and key dates of the recruitment process.

Please ensure you complete <u>all</u> parts of the application form. Curriculum Vitaes (CVs) are <u>not</u> accepted. The application form will be used to assess your skills, knowledge, and suitability for the job against the criteria on the person specification, so please ensure it is accurate and complete. Late applications will not normally be considered. We reserve the right to contact any of your previous employers/educational establishments to verify the information provided.

Personal Details

Only personal information required for processing your application is requested in the main body of the application form, other personal details are not required until after shortlisting.

Disabled Applicants

As an equal opportunities employer we welcome applications from disabled people. Disabled applicants meeting all the essential criteria will be shortlisted for interview or test.

If you consider yourself disabled, **please indicate this on your application form**. This will be removed by a member of staff not involved in the recruitment process, prior to shortlisting, and will not be given to the recruitment panel at any stage of the process.

Where it is necessary to reduce the shortlist of candidates using desirable criteria, the equality monitoring section will be checked by a member of staff not involved in the recruitment process to ensure if you have declared yourself as disabled, and met all the essential criteria, you have been shortlisted for interview or test.

All candidates called for interview will be asked if they require any adjustments and/or adaptations in order to attend for interview or test, and we will, as far as possible, provide the adjustments and/or adaptations required.

For successful candidates, we will make reasonable adjustments to working conditions or physical environments and will provide aids, adaptations, equipment, and support where possible.

Job Sharing

We regard all posts as potentially open to job share. Pay will be pro rata to that which would apply if you filled the post on a full time basis. If you wish to be considered for job share, please indicate this on the application form. Should you be offered the post your request will then be considered.

Relationships/Canvassing

Canvassing of any employee, governor or trustee in relation to your application will disqualify you, or if discovered after appointment may result in dismissal without notice.

Data Protection & GDPR

The information you provide on your application form and any subsequent information gathered in respect of your application will be held securely, in confidence and processed in accordance with the Data Protection Act 1998.

The information you provide will be used in the following ways:

- To assess your suitability for the post
- To confirm information you have supplied, with third parties, as considered appropriate.
- To promote, monitor, and take action to ensure our recruitment policies, procedures and processes comply with legislation, our Employment Equality Policy and associated strategies and plans.
- To answer requests for information made under the Freedom of Information Act 2000 or related legislation.
- It will only be disclosed where lawful obligation applies.

Applications and related information in respect of successful candidates will be held securely on computerised and/or manual filing systems in accordance with the Data Protection Act 1998.

Applications and related information in respect of unsuccessful candidates will be held securely for 12 months in line with our recruitment and retention policy, after which time they will be confidentially destroyed.

Feedback/Complaints

If you are not appointed to the post following interview, you may request feedback from the CEO, or the recruiting manager, as appropriate. You should contact the Trust directly who will arrange to provide helpful and constructive feedback.

If you wish to make a recruitment complaint, you should write to the CEO or recruiting manager as appropriate, at the Trust. If you are unsatisfied with the response, you may then write to the Chair of Trustees, care of the Trust.

Safer Recruitment Applicant Information

The Trust has a commitment to safeguard and promote the welfare of children and/or young people. We have robust processes and procedures to reduce risk and continuously promote a positive culture of safeguarding amongst our workforce.

The post you are applying for involves working with children and/or young people and you will be subject to The Trust safer recruitment process.

Pre- Employment Vetting

As part of its safer recruitment and selection process, The Trust operates a strict pre-employment vetting procedure. All applicants will be required to undergo the checks outlined below.

Disclosure and Barring Service (DBS)

Successful applicants seeking to work with children and/or young people will be required to undergo an Enhanced Disclosure; this will include a check against the Protection of Children Act (PoCA) List and List 99. For posts working with vulnerable adults, this will include a check against the Protection of Vulnerable Adults (PoVA) List.

We will also retain, with the permission of the applicant, the DBS Disclosure documents of any 'hold' candidates. These documents will be destroyed once a decision (offer and acceptance) has been reached.

Where an applicant is not normally resident in the United Kingdom or has been resident outside the United Kingdom for more than 6 months, an additional police check will be carried out with the normal or most recent country of residence.

Rehabilitation of Offenders & Safeguarding Children and Young People

We are committed to keeping children and young people safe from harm and abuse and to promoting their welfare, and we expect that everyone who comes to work for us will share the same commitment. Fulfilling this responsibility includes making sure that our recruitment process includes a range of measures to identify those who may be unsuitable to work with children and young people.

All roles within the Trust are covered by the Rehabilitation of Offenders Act 1974 (Exceptions) Order 1975 and are subject to an enhanced Disclosure and Barring Service (DBS) (formerly Criminal Records Bureau (CRB)) check. These posts may also be subject to further DBS rechecks at appropriate intervals. Further information about what the Rehabilitation of Offenders Act 1974 (Exceptions) Order 1975 means for applicants is provided on the Application Form.

Declaration of Previous Convictions

The Rehabilitation of Offenders Act 1974 (Exceptions) Order 1975 as amended makes certain regulated activity (i.e. work with children and/or young people) exempt from the Act and therefore, requires individuals seeking to work with these groups to be subject to Enhanced Criminal Records Bureau Disclosure checks amongst others.

This post is classed as exempt under the Rehabilitation of Offender Act 1974 (Exceptions) Order 1975 as amended. Therefore, you are required to reveal all convictions, both spent and unspent in your application. Please note that having a criminal record is not an automatic bar from working with us: whether or not your criminal record has a bearing on the post you have applied for will be carefully considered as part of the recruitment process. This may involve a discussion with yourself about the circumstances and background to your offences.

Supporting Documents

We will not be able to confirm an offer of employment until we have confirmed the following:

- Identity
- Enhanced DBS
- Right to work in the UK
- Qualifications if applicable
- 2 references

- Satisfactory Medical
- Qualified Teacher Status if applicable
- Confirmation of National Insurance Number
- Overseas reference if applicable

References

All applicants are expected to provide two referees, one of which must be your most recent or current employer. 'Open' references e.g. those addressed "To Whom It May Concern", will **not** be accepted.

If you have just completed full-time education the Trust will seek references from educational establishments. You will need to provide the name of your CEO or other professional as a reference. If you are self-employed you will need to provide details of individuals/businesses that can provide you with a professional reference.

If you have undertaken voluntary work with children and/or young people you should use the voluntary organisation as a referee.

If you have not previously worked with children or young people, you must provide a character reference from someone who is able to confirm your suitability to work with children. This would normally be someone in authority e.g. a lecturer, doctor, or community leader. Please note, character references are normally only accepted as a supplement to an employer's reference.

In all cases, The Trust will contact the referee prior to the interview, except if you have specifically indicated that you would prefer us to contact them only if you are made an offer of appointment.

Employment History & Gaps in Employment

To ensure our responsibilities for safeguarding children and young people are met you must ensure your employment history and reasons for any gaps are clearly detailed.