

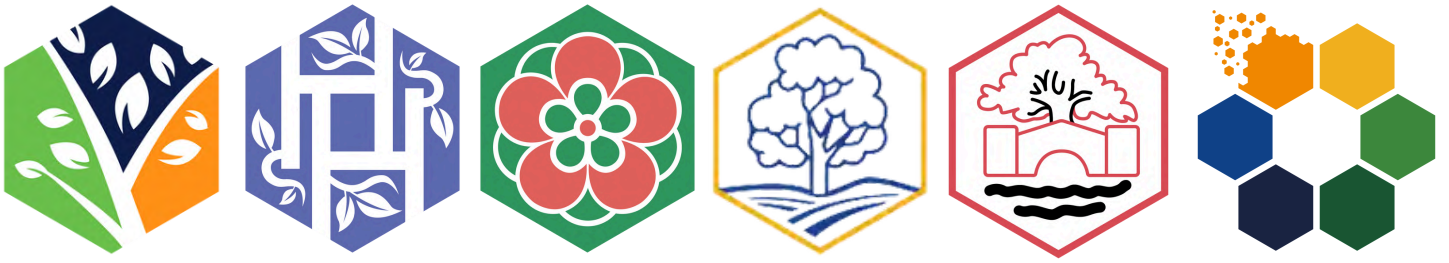


BROADLEAF

PARTNERSHIP TRUST

FINANCE DIRECTOR APPLICATION PACK





WELCOME FROM THE HR DIRECTOR

Thank you for your interest in this opportunity to join our growing trust as our Finance Director. I hope you find this information pack helpful, and that it furthers your aspiration to work with us.

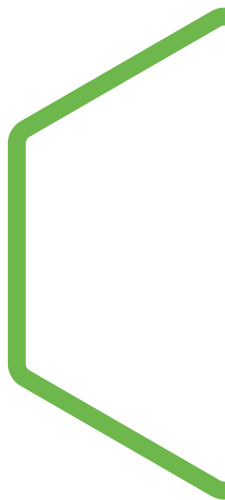
We are a small academy trust with big ambitions. We're here to give children and young people a lifelong love of learning and to equip them with the skills they need to realise their personal ambitions. Our schools are places where children flourish, in environments that celebrate success, deliver academic excellence and foster curiosity, inclusivity and creativity.

Please do take some time to read more about our visions and values (contained within the 'About Our Trust' section), which sets the scene for our work ethic. Also within this pack you will find an overview of our current finance strategy and how this supports our educational delivery, and wider information about the other operational directorates you will work alongside.

We create exciting futures – both for our learners and our staff, and we'd love to welcome you on board.

I look forward to hearing from you.

Samantha Palmer
HR Director



JOB DESCRIPTION & SPECIFICATION

Job Title - Finance Director
Post reports to - Chief Executive Officer
Responsible for - Finance Directorate
Status - Full time, whole year
Salary - Competitive
Closing Date - Thursday 12th December

Job Purpose:

The Finance Director will lead the finance directorate, keeping abreast of funding and legislative changes that apply to the education sector and will provide the CEO, Board of Trustees and other stakeholders with strategic financial information to enable them to make informed financial decisions in a timely manner.

Responsible for the line management of the finance function and managing the Trust financial position, ensuring financial systems and activity are enablers of school improvement.

Main Accountabilities:

- To be the guardian of our financial sustainability, continually evaluating the robustness and effectiveness of appropriate financial systems and processes to drive financial efficiency across the Trust.
- To lead the work of the finance team, ensuring regularity and compliance.
- To co-ordinate with the work of the external auditor to prepare and submit audited statutory consolidated accounts, facilitating all audit arrangements and providing the CEO and Board with a timetable of audit activity and arrangements, as required by financial regulations and memoranda.
- To devise and implement plans to respond to and meet the expectations set out in any management letters or audit actions.
- To prepare and present short and long term budget projections, and monitor financial performance, constantly driving greater financial knowledge and effectiveness across the Trust.
- To work in alliance with School and Trust leaders so all parties have a good working knowledge of the Trust budget model, strategic and operational aims, and how our communities are best served.
- Provide assurance to the Trust Board and the Chief Executive Officer about overall financial matters, including financial strategy and risk, systems of internal financial control, financial standing and sustainability of the Trust's financial position.
- To promote best practice and to ensure compliance with the financial processes and procedures set out in the policies of the Trust and in accordance with the Trust Handbook, and the requirements of regulators.
- Ensure the timely completion of all financial and academy-related returns including to the DfE, HMRC, Companies House, Teacher Pensions Authority and the Local Government Pension Scheme administrators.
- Contribute to the strategic direction of the Trust and the development and implementation of the Trust's strategic plans in line with the overall vision and ethos of the Trust.
- Work alongside the CEO and other Trust leaders to effectively and efficiently 'on-board' new schools to the Trust. This will include supporting the undertaking of due diligence and scrutiny of the school's financial standing and planning.
- Ensure that the Trust's account processing and reconciliations are compliant with statutory and regulatory requirements and as outlined in the Academy Trust Handbook.
- Ensure that the annual accounts are properly audited, presented and adequately supported by underlying evidence, including the maintenance of effective systems of internal control.

Further information including an Applicant's Guide, Privacy notices and our Recruitment and Selection Policy can be found on our career site.

If you would like to speak to someone in advance of your application, or arrange an appointment to visit us, please contact Claire Pritchard, CEO on c.pritchard@broadleafpt.co.uk

Closing Date : Thursday 12th Dec

Interview Date: Tuesday 17th Dec

*We reserve the right
to close the advert
early

Main Accountabilities continued...

- Develop a three-year financial plan, taking into account DfE and relevant government guidelines and other sources of information about budget trends and local pupil demographics, reviewing on an annual basis.
- In conjunction with the CEO, and utilising ICFP, support and challenge Headteachers and Trust leaders to develop optimum budgets for each school and directorate, and consolidate these into an overall Trust budget, ensuring all appropriate priorities are met.
- Deliver financial management accounts, forecasts and reporting across the Trust, producing the information required and analysing significant variances and trends to share with all relevant stakeholders, in accordance with agreed timetables.
- In conjunction with the HR team and external payroll provider, manage the monthly payroll, ensuring that resources are used appropriately to provide a cost effective and efficient service.
- Work in partnership with Trust and school leaders when required to ensure any business cases, procurement proposals or options appraisals are fully and appropriately costed and benchmarked, preparing Value for Money Statements as appropriate.
- To oversee appropriate credit control processes thus ensuring that the swift payment of outstanding sums and overseeing the recovery of VAT as appropriate.
- Line management responsibility for the central Trust Finance team, liaising with the Headteachers on staff performance as required.
- To provide training, as required, to meet the needs to the Trust,

This Job Description is current at October 2024, and is representative of the duties/responsibilities expected of the post. These duties and responsibilities are neither static nor exhaustive and, at the discretion of the Chief Executive Officer, are liable to variation to reflect any future changes required of this post.

We are committed to safeguarding and promoting the welfare of children and young people and expect all staff and volunteers to share this commitment. Successful candidates will be subject to an enhanced DBS check.

We are committed to equality and value diversity, and therefore particularly welcome applications from under-represented groups.

This post is covered by Part 7 of the Immigration Act (2016) and therefore the ability to speak fluent and spoken English is an essential requirement for this role.

This post is exempt from the Rehabilitation of Offenders Act 1974 and the amendments to the Exceptions Order 1975, 2013 and 2020, which means certain spent convictions and cautions are 'protected', so they do not need to be disclosed to employers. If they are disclosed, they will not be taken into account.

PERSON SPECIFICATION

Qualifications

Essential

Professional qualification in finance or accounting
e.g CIPFA, ACCA, CIMA

Evidence of further, appropriate professional development

Desirable

Level 6 Diploma in School Business Management or equivalent

Experience, Skills & Knowledge

Essential

Sector specific experience in a senior finance role
Experience of working at a senior, strategic level within an organisation
Extensive experience in budget management and forecasting delivering management and financial accounts gained in a 'hands on' role.
Commercially astute and have exceptional analytical and problem solving skills with the ability to make decisions based on accurate and appropriate analysis
Detailed knowledge and experience of financial planning compliance and budgetary control processes, being able to lead the development of the 3-year financial plan
Proficient in use of MS Excel spreadsheets and computer based accounting packages
·Excellent communication skills (written & oral) including the ability to effectively negotiate and influence and present to a wide range of audiences, including the Trust Board
Ability to constantly improve own practice and knowledge through self-evaluation and learning through others.

Desirable

Knowledge of payroll and processes
Strong understanding of all areas of Academy policies and objectives
Experience of stakeholder relationship management
Senior operations management in a MAT
Experience of IMP, Xero, ApprovalMax and Arbor

Personal Qualities

- An awareness of and commitment to outstanding education
- A strong communicator and relationship builder, able to work equally adeptly with Board Members, CEO/Headteachers and internal service teams. The ability to provide critical challenge to existing practices at all levels, and create alternatives that are more effective.
- Ability to lead, motivate and inspire a range of teams
- Resilience, perseverance and tenacity
- Commercial and numerical acumen
- Flexibility and adaptability
- Results focused and 'can do' approach
- Internal and external customer focused
- Able to work under pressure and balance strategic and planning activities.
- Be committed to equal opportunities and success for everyone in Broadleaf Partnership Trust
- Be committed to safeguarding and promoting the welfare of children and young people.



AN INTRODUCTION TO BROADLEAF

Our Trust team and Board of Trustees are proud of what we have achieved at Broadleaf since we set out to reimagine our vision and strategic direction in 2021, however we know that our journey is far from complete.

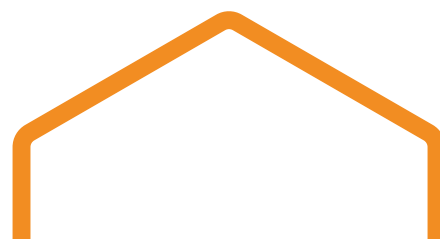
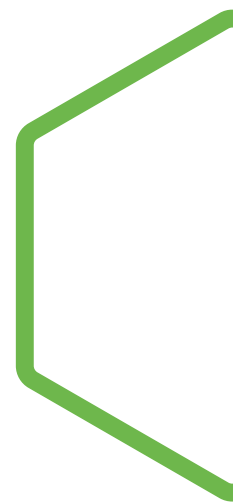
We have laid a solid foundation, based on the principles of operational excellence, from which we are able to enact our philosophy of servant leadership, focusing on improving our schools, learners and communities, and have carefully curated structures and systems that have evoked a culture of mutual respect and advocacy across our Trust that has prompted other schools to express interest in joining our partnership.

We passionately believe in the power of collaboration and look to ensure all staff across our schools not only have the opportunity to learn and grow together, but benefit from the shared expertise of our operational teams. I am looking forward to exploring how you can play a pivotal role in our next chapter.

Please do visit our websites or arrange a conversation with me to learn more about this fantastic opportunity.



Claire Pritchard, CEO



ABOUT OUR TRUST

Our Vision

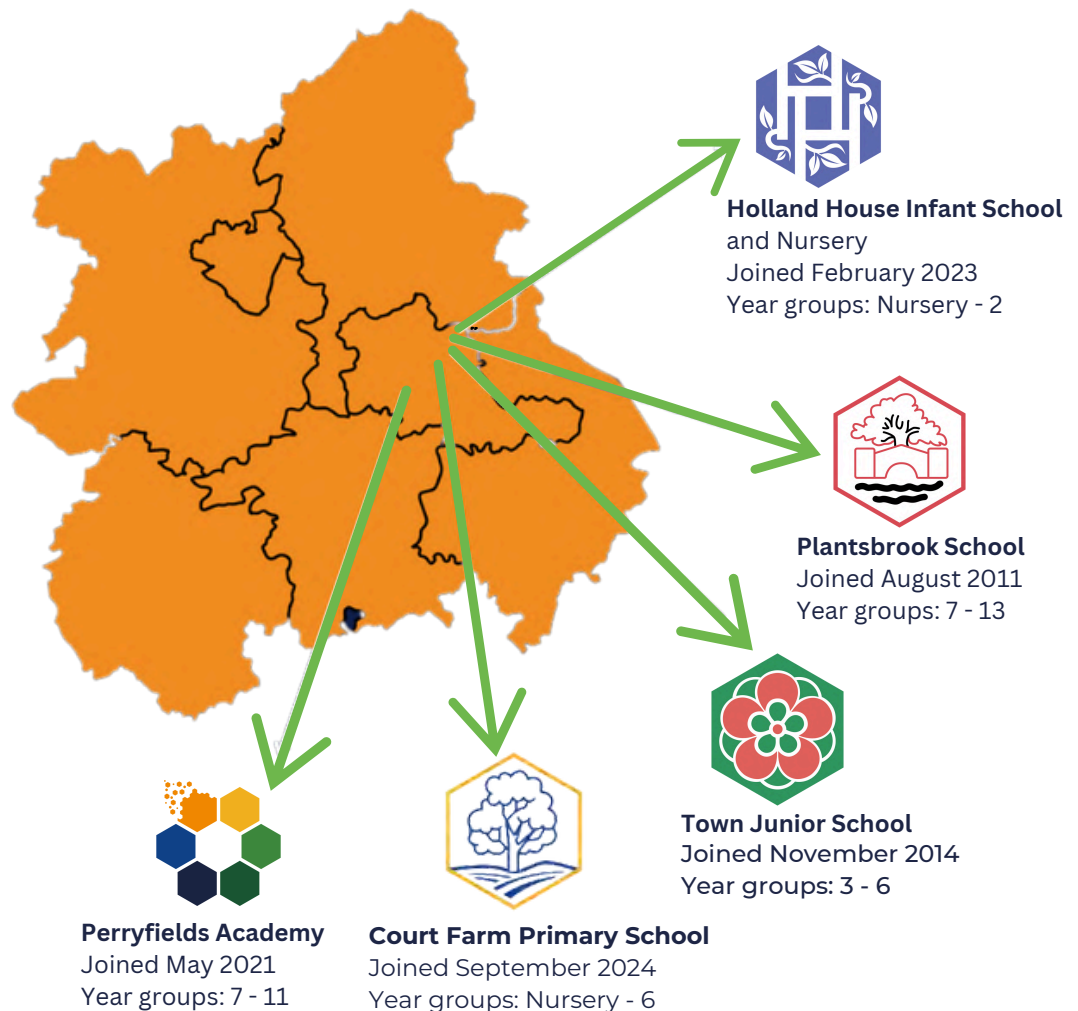
Broadleaf Partnership Trust will lead and enable community centred schools that raise and realise aspirations, celebrate successes, and promote a lifelong love of learning.

Our Values

Aspiration- We celebrate a culture of continuous improvement, where all stakeholders are motivated to achieve the very best for every child. We aspire to create learning environments that foster curiosity, inclusivity, talent and creativity so that every child is encouraged to recognise their potential and develops ambitions that reflect their future goals.

Alliance- Working in partnership across our schools and in affiliation with stakeholders, across the education sector and beyond, we can access information and networks that help to continually develop our people, communities and practice. Our collaborative approach enhances the strength of unity across our Trust whilst simultaneously recognising the uniqueness of our schools. We align many of our operational aspects whilst empowering learning leaders to meet the curriculum needs of their community.

Agility- We are agile in our approach, embracing change, and focused on excellence. We ignite and harness people's passion by encouraging experimentation and innovation to make learning meaningful, build organisational resilience and ensure our approach stays current. We adopt a culture of shared and servant leadership across our Trust that enables action and provides the flexibility to respond and adapt to the ever-changing climate.



OUR FINANCE STRATEGY

Finance underpins all of our activity and working efficiently is fundamental to ensure we remain sustainable and innovative. We do this by viewing our income as one 'pot' (with the exception of pupil-specific funding streams such as pupil premium - which remain with the school), consolidating our commercial activity to achieve best value, and our reserves to drive improvement. Below is an overview of our current Finance Model, a more in depth version is available via the Join Us pages of our website.

THE BUDGETING PROCESS

We are not obsessed by the mechanics of our model; rather focus on the principles behind it. As far as possible, we adopt the principles of zero-based budgeting to ensure there is a purpose to every pound.

Curriculum budgets are delegated to school leaders as they are best placed to meet the contextual needs of their students and our Headteachers remain responsible for setting their education budgets.

We unlock our ability to be efficient by pooling all of the commercial and operational elements of our budget into one cost centre, overseen by the CEO. This allows us to react swiftly to mitigate cost or service risks whilst also freeing our learning leaders from the peripheral burden of contract management that they are less expert in.

EXPENDITURE

At its most basic level, there are three specific stages to setting our annual budget:

1. Ensuring we have all of the right contracts in place to ensure the lawful and efficient operation of our schools and Trust.
2. Staffing and resourcing each of our schools to deliver their curriculum and school improvement priorities as well as meet any peripheral student needs.
3. Staffing and resourcing our Trust to provide professional services to our schools.

BALANCING THE BUDGET

Once all costs are incorporated into our Trust budget, they will be balanced against our incoming revenue funds.

Our aim is to allocate all of our annual revenue income to expenditure so that those students from which income is derived see the benefit of it.

If costs exceed income, as well as reviewing Trust costs for appropriateness, Trust staff will work with Headteachers to scrutinise efficiencies at school level using integrated curriculum and financial planning (ICFP) data as a foundation for discussions.

Budgets are given final approval through the Board of Trustees.

BUDGET OPERATION & AMENDMENTS

Education budgets are monitored regularly between Heads and the Trust team, with Trustees evaluating consolidated financial activity on a monthly basis.

We ensure that our operating finance model, systems and procedures are not overly bureaucratic to the point that they create barriers to Headteachers making the right contextual decisions for their school or slowing delivery.

Should it become apparent that a specific need or initiative sits outside of the scope of the agreed budget then Headteachers should discuss this with Trust leaders to seek a resolution.

RESERVES

As with our revenue income, reserves across our Trust are pooled – allowing us to enact our investment strategy to maximum effect. Reserves are held to ensure that unexpected financial events do not result in business interruption in the current year as well as being committed to planned major asset purchases, improvements or investing to ensure sufficient capacity to deliver strategic plans.

CAPITAL FUNDING

We are eligible for automatic funding for capital (School Condition Allocation) derived from condition data collected by the DfE.

This income will be managed centrally and allocated in accordance with our own conditions data. Eligibility for this funding stream gives us more certainty over delivering our capital improvement programme and alleviates the pressure on revenue funding to meet these costs.



OTHER OPERATIONAL DIRECTORATES

The philosophy of our Trust is to create a team around the school. Our operational areas support our educational delivery on a daily basis. Our teams work with school leaders to identify and deliver on school priorities, strategically leading operational workforce and projects whilst Headteachers retain the authority to manage their school on a daily basis.

Our directorate leads are experts in their respective fields and ensure our compliance as a Trust through the setting of trust-wide strategies, policies and procedures. Our shared systems afford us a live overview of activity and enable us to adhere to audit requirements - all without placing the burden back onto schools.

Education

Our approach to educational improvement is very much driven by a collaboration that thrives on our network of educators sharing successes and spotlighting best practice.

Our Education Director is the catalyst for this collaboration. It is their role to co-ordinate education development across our Trust and facilitate the right support for each school to ensure sustainable improvement.

To see more information about our finance model and other strategy documents, please visit our website: www.broadleafpt.co.uk

Human Resources

Our people are our most valuable asset and we recognise that we can only deliver excellence to our learners if we nurture and empower our staff.

Our HR activities align under three strategic aims which focus on recruiting the right people, ensuring they feel a sense of purpose, and developing them by working with our school leaders to support progression within and beyond your school, attracting quality candidates, identifying development opportunities, brokering coaching and mentoring, and supporting wellbeing.

OPERATIONAL DIRECTORATES

Estates

We aim to maintain a safe, efficient and functional estate that supports curriculum delivery, creativity, and community engagement within our schools - all whilst working towards Net Zero.

Our strategy and underlying data sets allow us to plan repairs, refurbishments, or replacement of facilities that result in quantifiable and sustainable improvement across our estate.

Information Technology

Our IT team work with school leaders to ensure technology is a true enabler of the learning experience, as well as a reliable administrative tool. We pride ourselves on the support we offer and the technical expertise of the team.

Our key aims are safety, reliable connectivity, appropriate infrastructure and innovation.

We are steadily increasing the number of devices for learning in our schools so that everyone has the right tools for the job.

Communications

We believe in sharing our successes as much as possible, both internally and externally.

Through our website design, social media management, news writing skills and Trust-wide intranet, our Communications team are on hand to ensure good news travels fast.

With risk aversion and crisis management strategies, we'll support you through any situation.





GROWING TOGETHER: OUR AMBITION

We are a Trust full of ambition for our current school communities and those we will serve in the future.

We have purposefully grown slowly, taking our time to evaluate our readiness to serve more schools well before pursuing further opportunities. Having engaged with the DfE and other external agencies to quality assure our Trusts approach we now have every confidence that we are ready to welcome more schools into our partnership.

We are resolute that our alliance will remain:

DIVERSE - WE STRONGLY BELIEVE THAT DIVERSITY BRINGS A WONDERFUL OPPORTUNITY TO LEARN FROM EACH OTHER AND WELCOME DISCUSSION WITH SCHOOLS WHO SERVE DIFFERENT DEMOGRAPHIC COMMUNITIES, INCLUDING SPECIAL AND ALTERNATIVE PROVISION OR THOSE WHO ARE IN NEED OF RAPID SCHOOL IMPROVEMENT

LOCAL - WE WANT OUR PARTNERSHIP TO BE IN CLOSE ENOUGH PROXIMITY TO TAKE FULL ADVANTAGE OF OUR SUPPORT NETWORKS AND OPPORTUNITIES TO WORK COLLABORATIVELY. WE DO HOWEVER PERCEIVE THERE TO BE ADDED VALUE IN WORKING WITH SCHOOLS IN NEIGHBOURING LOCAL AUTHORITIES TO EXPERIENCE NEW APPROACHES

BALANCED

WE ARE CLEAR THAT WE DO NOT WISH TO BE PRIMARY OR SECONDARY LED, HARNESSING THE EXPERTISE THAT EACH PHASE OFFERS

COMMITTED TO OUR TRUST VALUES

EVERYTHING WE DO IS CHILD-CENTRIC AND ROOTED IN OUR VALUES. WE WILL THEREFORE ENSURE THAT ANY SCHOOL THAT WISHES TO JOIN US DEMONSTRATES AN ALIGNMENT TO OUR CORE PRINCIPLES

WHAT OUR REVIEWS SAY:

“The trust has a clear and well communicated set of core values. Its vision, strategic direction and ways of working are being strengthened following a period of development of trust-wide approaches.”

NGA External Review of Governance
2024

“The CEO has clear plans and a shared direction for the budget and use of reserves to enable short and medium planning, which will underpin future growth, stability and financial security. There is capacity for growth.”

ESFA School Resource Management Adviser
2024

“The trust has a clear and detailed understanding of their education vision, strategy, and how this will be effectively supported and enhanced by their estates and operations. The trust has a good level of data in place across the estate.”

DfE Capital Advisers Programme
2023



BENEFITS BEYOND THE CLASSROOM:



Employee Assistance Programme

This provides 24/7 access to a range of health and wellbeing services either by phone or online, including a helpline operated by trained counsellors to provide 'in the moment' support, wellbeing resources and webinars, structured counselling sessions and financial and legal advice.

24/7 GP service

As a Trust employee you and your immediate family have access to a private GP service available at any time of the day or night worldwide. Telephone or video appointments can be booked at a time to suit you, allowing you easy access to medical diagnosis, reassurance advice, private (payable) prescriptions, fit notes and open referrals.

Cycle to Work Scheme

This salary-sacrifice scheme allows you to purchase up to £1,000 of bicycle and safety equipment tax-free, spreading the cost over either 12 or 18 months.

Health Cash Plan

Our optional health cash plan allows you to reclaim costs related to dental, optical, therapeutic and other health-related expenses, including diagnostic consultations, screening, hearing aids, surgical appliances and NHS prescriptions. Personal accident cover is also included as standard. Contact HR for more detail.

Shopping and Lifestyle Discounts

Wider Wallet is an online discounts platform providing a range of offers and discounts from well-known retailers and high street brands as well as discounts on dining, travel, technology, entertainment and days out.

Pension

Plan for your future with a generous and secure pension scheme for teaching and support staff, ensuring financial wellbeing during retirement. .