



**Chief Finance Officer**

**Candidate Pack**

**Location:** Stockton-on-Tees

**Start date:** 6<sup>th</sup> January 2025 or as soon as possible



# A message from our Chair of Directors

Dear prospective applicants,

Thank you for taking the time to look at, and consider, applying to St Mark's C of E Primary School, part of One Excellence Multi Academy Trust.

I am proud to be the Chair of Directors of this inclusive, thriving school, where children are put at the forefront of every decision. Our strong team of leaders ensure that the school provides for children's individual needs as well as developing a robust team of teachers and support staff who are highly trained. St Mark's staff strive for an outstanding level of education every day, ensuring our pupils academic and pastoral needs are met.

As a church school we are strongly guided by our Christian vision and values. We welcome everyone into our school, all faiths and none, and are respectful of each person's individual beliefs and views.

I strongly encourage a visit to our wonderful school so that you can get a feel of the work that is undertaken daily. If you have any questions or queries, please do not hesitate to contact the school, or a member of the school team who will do everything they can to help.

Tom Cunningham



# Our Trust

Since its formation in 2017 One Excellence Trust has grown to include four primary schools, all with thriving nurseries, providing education and opportunities for 1,050 students. As part of our Trust we incorporate one of the 36 DfE English Hubs and two EMS bases (one for communication and interactions and one for SEMH) and a community nurture hub. We pride ourselves on transforming education locally and regionally, with our schools and nurseries being at the heart of their local communities and are determined to raise standards of educational achievement to the very highest levels.

All of our schools are an integral part of their local communities and have a strong sense of identity. We value the contribution each of our communities make and the distinctive opportunities and diversity they offer to the Trust. Working in collaboration, we offer exceptional learning experiences to all of our children, so the children benefit from the strength that being part of the extended One Excellence family brings.

Our vision is to be an ambitious, inclusive, collaborative family of schools, ensuring excellence in education whilst celebrating individuality. We are passionate that as a family of schools we can provide a much better standard of education than working on our own. We know we improve more rapidly as a group of schools in a Trust than if we were a school on our own in an isolated position. This rapid improvement is not achieved at the expense of any school losing its own unique identity or its position within its community. Our academies have no motivation to all be the same. They are different in accomplishments and context but we share the same values and vision for our staff and students. Each academy is a driving force in its own right. By working collaboratively we've been able to create an effective and efficient organisation and business model that allows school leaders and teachers to focus all their attention on their pupils. We work together in a supportive network to evaluate, challenge and improve practice inside and outside of the classroom. We want our students to grow into fully equipped individuals who make meaningful contributions to society and our staff to reach their full professional potential.

We live in a world that requires our children to be prepared to think both critically and creatively, solve complex problems and to communicate well. Mastery of the basics: reading, writing and maths is our core purpose and this sits equal to ensuring our children have access to a high quality non-cognitive skills curriculum ensuring well-developed social and emotional skills.

You can find out more about our Trust by visiting <https://www.oneexcellence.co.uk/>





**JOB DESCRIPTION: Chief Finance Officer**

**SALARY: NJC - PO6, spinal points 40 to 43**

**37 hours** — Will consider flexible working and/or part time  
**(Actual Salary £51,504 to £54,092)**

**TYPE: Permanent Contract**

**REPORTING TO: Chief Executive Officer**





## Chief Finance Officer

### Job Description

#### Core Purpose

##### Main Purpose

As a member of the Executive Leadership Team of the Trust, the post holder will lead the development and implementation of the Multi Academy trust's financial and business support functions. These will include Finance, Human Resources, Governance Support, Student Records, Marketing, Health and Safety, overseeing the Estates Management Strategy and IT Support functions, as well as having overall management of the Business Planning for each school within the Trust.

#### Core Qualities

The Chief Finance Officer will have:

- Uphold public trust in leadership and maintain high standards of ethics, behaviour and professional conduct
- Build positive and respectful relationships across the Trust
- Serve in the best interests of the pupils' and staff within the Trust
- Be active in growing the Trust's reputation
- Lead and implement effect equality, diversity and inclusions across the Trust community
- A friendly, approachable and professional manner
- A calm approach
- A commitment to working as part of the whole Trust team and supporting the vision and aims of the Trust
- Able to improve their own practice through observations, evaluation and discussion with colleagues.

#### Qualification, knowledge and skills

- Relevant degree or recognised professional qualification
- Evidence of continued commitment to personal professional development
- Experience of working as part of a senior management team and implementing service improvements
- Experience of turning business strategy into successful outcomes
- Successful track record of management experience within a large, complex organisation
- Experience of financial management including income generation
- Experience of leading and supporting through processes of continuous improvement
- Experience of overseeing an Estate Management Strategy
- Knowledge and understanding of academy structures
- An understanding of the key issues facing schools and academies
- Experience of developing and implementing successful financial strategies
- Ability to communicate at all levels both verbally and written
- A high level of presentation skills
- Ability to think strategically and to analyse complex situations, formulating and implementing plans of action
- Numeracy and literacy skills to handle data and information critically, accurately and effectively
- Have detailed knowledge and understanding of:
  - a. Company Act accounts
  - b. Management accounts
  - c. Computerised accounting packages
  - d. Funding arrangements for schools and academies
  - e. Internal control and risk management
  - f. Commercial requirements
  - g. Estates Management
- Marketing planning and implementation skills developing appropriate strategies and achieving successful results
- Public relations skills including the ability to speak at public forums
- Capable of working with achieving income targets

- Able to work with colleagues and contacts from a range of backgrounds
- Highly developed organisational skills managing time well to meet competing priorities
- Ability to prioritise workloads and manage the delegation of work effectively
- Be able to maintain confidentiality
- Equal Opportunities and recognising the nature of the diverse school community
- Understanding of basic technology – computer, video, photocopier etc
- Working knowledge of relevant policies/codes of practice/legislation

## Responsibilities

### General Responsibilities

- To participate as a member of the Executive Leadership Team of the Trust and contribute to the overall management and development of the Academy Trust
- To advise the Executive Leadership Team of the trust on strategy in relation to finance and business development
- To effectively manage a wide range of business service contracts so as to ensure best value for the Academy Trust
- To act as the Senior Line Manager to the Finance, Human Resources, Governance Support, Health and Safety, Estate Management, Marketing and IT Services functions across the Trust
- Be responsible for maintaining a healthy and safe working environment by ensuring that health and safety policies, procedures and codes of practice are followed
- Support and develop the Academy Trust's internal controls and risk management processes
- To provide advice on all aspects of Finance, Accommodation, Governance, Health and Safety, IT and Human Resource implications strategies to the Academy Trust's Board and produce policy initiatives for the Academy Trusts' consideration
- To undertake any additional responsibilities that may be required by the CEO commensurate with the grade and nature of the post

### Main Responsibilities

#### Financial

- Be the designated Chief Financial Officer for the Trust and ensure Trust wide compliance with the Academies Trust Handbook
- Conduct reviews and evaluations of cost reduction opportunities and regularly monitor the Trust's contracts and Service Level Agreement's to ensure value for money is achieved
- Manage the internal audit contract and all work undertake in financial areas
- Co-ordinate the external audit team, ensuring that all work is undertaken in order to meet governance and statutory requirements
- Support the CEO/Directors to develop a Trust Business Support strategy that responds to national and local priorities and includes:
  - Development of the financial management accountant function of the trust, in line with DfE, Companies House and Charity Commission requirements
  - Ensure that all financial and other information is returned on a timely and accurate basis
  - Lead on the development of multi-year budgets aligned to the Trust's Improvement Plan, ensuring all activities are appropriately and accurately costed and taking intervention action as required
  - Ensure the opportunities for all income streams are maximised and that the business plan is costed and updated regularly
  - Maintenance and updating of the financial regulations, internal control procedures and other regulatory frameworks
  - Lead and advise on all aspects of treasury management and taxation
  - Ensure that accounting and other business development systems are subject to continuous improvement

#### Communication

- To ensure that the Trust Board are regularly updated on progress regarding the fulfilment of the school's financial, student records, external funding, human resource, health and safety, governance, accommodation and IT objectives
- To ensure relevant reports are provided to the Trust Board and Executive Leadership Team on a timely basis

- To ensure accurate and timely production of financial information to both internal and external stakeholders
- To lead on the Trust's statutory Freedom of Information requirements

### **Management Information Systems**

- To have overall management control of the Management Information System of the Trust, including ensuring the Trust achieves the requirements of student records and other audits
- To ensure that management information is completed to timescales required within the financial regulations and to meet funding requirements

### **Business Development**

- To take personal responsibility for an annual income generation target linked to the Trusts Business Improvement Plan

### **IT Services**

- To ensure that the Trusts IT Strategy meets the curriculum and business requirements of the Trust
- To take responsibility for the management of the IT services business continuity plan

### **Customer Services, Administration and Marketing**

- To establish appropriate customer service and administrative functions that promote the Trusts core values and provide the highest possible standards of service across all schools within the Trust
- Establish a marketing strategy that supports the objectives outlined in the Trusts Development Plan and that ensures that each school and ultimately the Trust, meets its recruitment and income targets in the areas of student numbers, hire of facilities, CPD etc.

### **Resources**

- To develop and implement an effective estates management strategy that meets the curriculum and business requirements of each school and the Trust
- To ensure that the services provided by facilities management are of the highest standards, represent value for money and are in line with best practice
- To manage the capital building projects, ensuring that the agreed project objectives are fulfilled and be responsible for ensuring that the Executive Leadership team and the Trust Board are regularly updated on progress
- To recommend to the Directors the appointment/reappointment of appropriate professional advisers and contractors and be responsible for ensuring the Trust complies with best practice in all aspects of project planning, consultation, procurement and delivery

### **Human Resources**

- To provide senior leadership for Human Resources to ensure that people management strategies are developed and are in line with the curriculum and business requirements of each school and the Trust
- To ensure that a pro-active HR service, aligned to the strategy and vision of the Trust, is commissioned and delivered
- To support effective industrial relationships for all Trust employees and consult and negotiate with representatives of the recognised trade unions on a range of employment and HR related issues
- To take responsibility for the on-going development of the Trust's Health and Safety Policy
- Liaison with the CEO to ensure all services are coherent and fit for purpose

These duties are neither exclusive nor exhaustive, and the post holder will be required to undertake other duties and responsibilities, which the Trust may determine.

**Note: This job description may be amended at any time in consultation with the post holder.**

### **Health and Safety**

It is the responsibility of individual employees at every level to take care of their own health and safety and that of others who may be affected by their acts at work. This includes co-operating with the Trust and colleagues in complying with health and safety obligations to maintain a safe environment and particularly by reporting promptly any defects, risks or potential hazards. Specifically:

- To report any incidents/accidents and near misses to your line manager

- To ensure own safety and safety of all others who may be affected by the Trust's business

**Appraisal**

All employees will receive appraisals, and it is the responsibility of each employee to follow guidance on the appraisal process.

**Confidentiality**

All employees are required to undertake that they will not divulge to anyone personal and/or confidential information to which they may have access during the course of their work.

All employees must be aware that they have explicit responsibility for the confidentiality and security of information received and imparted in the course of work and using school information assets.

**Induction**

The school/Trust has in place an induction programme designed to help new employees to become effective in their roles and to find their way in the organisation.

**Safeguarding:**

One Excellence has a Child Safeguarding policy and procedure in place and is committed to safeguarding and promoting the welfare of all its students, each student's welfare is of paramount importance to us and you are expected to share this commitment. All staff will fully comply with the Trust's policies and procedures, attend appropriate training, inform the Designated Person of any concerns, record any potential safeguarding incidents appropriately.

**Equality and diversity:**

One Excellence is committed to equality and diversity and will take action to discharge this responsibility. Many of the actions, however, will rely on individuals embracing their responsibilities with commitment to ensure a positive and collaborative approach to Equality and Diversity. This will require staff to support the Partnership's initiatives on Equality and Diversity which will include development and training designed to enhance practices and the experiences of staff, students and visitors to One Excellence and the schools within it, with an all-inclusive approach that celebrates differences. Failure to embrace these commitments may lead to formal action being considered.

References will be requested prior to interview

**DBS:**

One Excellence is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment.

An application for a DBS certificate will be submitted for all candidates once they have been offered the position. For posts in regulated activity, the DBS check will include a barred list check. During the recruitment process, any offences, or other matters relevant to the position will be considered on a case-by-case basis.

Any offer of employment will be subject to receipt of a satisfactory DBS Enhanced Disclosure.

**Pre-occupational health:**

Pre-occupational health check is an essential part of the selection and recruitment process to assess if any reasonable adjustments are required.



## Person Specification

Shortlisting is a 2-stage process

Applications are initially assessed against the following criteria:

1. Overall presentation and completeness of application
2. Use of standard English
3. Grammatical accuracy Applications that meet the initial criteria will be shortlisted against the Person Specification

**The following Experiences /Qualifications/ Skills are essential (E) / Desirable (D)**

Qualifications and Education	E	D
Relevant degree or recognised qualification	✓	
Part or fully qualified accountant	✓	
Evidence of continued commitment to personal professional development	✓	
Masters degree in relevant field		✓

Experience and Knowledge	E	D
Experience of working as part of a senior management team and implementing service improvement	✓	
Experience of turning business strategy into successful outcomes	✓	
Successful track record of management experience within a large complex organisation	✓	
Experience of financial management including income generation	✓	
Experience of leading and supporting teams through processes of continuous improvement	✓	
Experience of Estates Management	✓	
Knowledge and understanding of academy structures	✓	
An understanding of the key issues facing schools and Multi Academy Trusts	✓	
Experience of developing and implementing successful financial strategies	✓	
Experience of initiating, leading and managing cultural change at a senior and strategic level in an organisation		✓
A proven record of success gained in the education sector		✓
A high level of commercial awareness		✓

Skills	E	D
Ability to communicate at all levels both verbally and written	✓	
A high level of presentation skills	✓	
Ability to think strategically and to analyse complex situation, formulating and implementing plans of action	✓	
Numeracy and literacy skills in order to handle data and information critically, accurately and effectively	✓	
Have a detailed knowledge of – Company Act accounts, management accounts, computerised accounting packages, funding arrangements for schools and Multi Academy Trusts, internal control and risk management and commercial requirement	✓	
Marketing planning and implementation skills developing appropriate strategies and achieving successful results	✓	
Public relations skills including the ability to speak at public forums	✓	
Capable of working with and achieving income targets	✓	
Able to work with colleagues and contacts from a range of backgrounds	✓	
Highly developed organisational skills managing time well to meet competing priorities	✓	
A good working knowledge of a range of effective school improvement strategies		✓
Design and production of promotional material		✓
Thorough understanding of school performance analysis and issues relating to improved achievement and attainment		✓

Personal Attributes	E	D
Self-motivated	✓	
Possess effective leadership skills with the ability to motivate and steer others towards achieving successful objectives	✓	
Dynamic, visionary and enthusiastic	✓	
Demonstrate effective decision-making skills including the ability to make quick decisions when under pressure and be willing to accept responsibility for decisions	✓	
A proactive approach to change with an ability to think laterally		✓
Confidence to work at a national level		✓
Political sensitivity and awareness		✓

Special Requirements	E	D
Flexibility and versatility	✓	
Emotional resilience	✓	
Ability to work flexibly to meet the demands of the post	✓	

Adaptability	✓	
Ability to influence across all levels of the organisation	✓	
Suitable to work with children/young people	✓	





If you wish to learn more about this exciting opportunity, would like an informal discussion or to arrange a visit to the school, please contact Lindsey Vollans, CEO on 01642 967045.

Please apply using link below: <https://mynewterm.com/jobs/16720/EDV-2024-OEMAT-02072>

Closing date: 9.00am on Monday 16<sup>th</sup> December 2024

Interview date: TBC