

The Potteries Educational Trust

Applicant Information Pack Chief Financial Officer

Salary: £80,383 - £86,313 per annum, pro rata

Closing Date: 9am, Friday 21st June 2024

Interview Day: Tuesday 25th June. (Shortlisted candidates will be contacted on Friday 21st June)



Direct Line: (01782) 854210

E-mail: HR@potteries.ac.uk

07 June 2024

Dear Applicant

Chief Financial Officer

Thank you for your interest in the above post. I hope this application pack and other documentation contains all of the information you need.

If, after reading the information, you are still interested in the post please complete an application form and return to HR@potteries.ac.uk. All candidates will be assessed against the information provided in the enclosed job description and the essential and desirable criteria outlined in the person specification, therefore, please consider the details in the job description and person specification carefully so that you know what the job involves and how you can match this in terms of your skills, abilities and knowledge. The information you provide in your application form and supporting information is the only information that we will have in deciding whether or not you will be shortlisted for an interview. Please do not attach a curriculum vitae or additional sheets as these will not be considered.

As part of the Trust's efficiency measures, we do not send letters to unsuccessful candidates, therefore if you do not hear from us within one month of the closing date you may assume that your application has been unsuccessful.

If you require any further information or wish to discuss the post in more detail, please do not hesitate to contact me in the HR Department on (01782) 854210.

Thank you again for your interest in the post and I look forward to receiving your completed application by 9am, Friday 21st June 2024.

Yours faithfully,



Heather McLachlan, CEO

About The Potteries Educational Trust

The Potteries Educational Trust

Our focus is to provide the very best education for every child and young person within the Trust, offering a high quality, broad, academic education for the children and young people of Stoke-on-Trent, North Staffordshire and beyond.

Working with like-minded partners the Potteries Educational Trust centers on the development of the very best practice in teaching, learning and assessment. We will provide teaching and learning in a nurturing, supportive environment with a broad range of opportunities and extra-curricular activities available for all within the Trust.

The Potteries Educational Trust was formed in 2017. We provide education for children and young people from 4 years to 18 years and beyond. Our establishments include the City of Stoke-on-Trent Sixth Form College, Biddulph High School, Moorside High School and Werrington Primary School.

Our Vision

As a Learning Community, we share common values and principles which are embraced at every academy within the Trust. These values form the foundations of everything that we do and achieve as a Multi-Academy Trust with one outcome in mind, to create a caring community that delivers excellence and inspires futures.

We have dedicated and committed Members, Trustees and Local Governors with a wide range of educational and business experience. Each school and college has its own Local Governing Body so that decisions are made at a local level specific to the individual needs of each school. Each establishment has its own individual character and uniqueness. It is important for our Trust to celebrate our diversity whilst working to our common values and principles.

We offer a vast range of opportunities through the curriculum and extra-curriculum activities to develop our young people for life experiences and promote high aspirations. The Trust has extensive links with regional and national businesses and universities. We provide wide ranging continuous professional development opportunities for all staff.

We are proud of being a Trust that successfully promotes the highest of aspirations in all our students as evidenced by the multiple opportunities available to meet leading professionals and academics, explore their vocation, experience educational visits across the globe and apply successfully for the most competitive of destinations.

Our Values

- We strive for excellence in both academic achievement and life experiences to provide a rich education and opportunities beyond just a set of qualifications.
- We seek to inspire our children and young people, raising their aspirations to be the best they can be and to make a positive contribution to our local and national community.
- We believe in the added value of working partnerships across all phases of education and the benefits and opportunities it brings to our students and staff.
- We will maintain an open access policy ensuring that admission is not based on academic success, within the context of the available curriculum in each establishment.
- The Trust will promote a broad, holistic education for all our children and young people who seek to broaden their understanding of the world.
- All partners in the Trust have an equal place and will work together with honesty, transparency and fairness. We will learn from each other to add value to our practices and to the children and young people and communities we serve.

Our Principles

By working together and learning from each other to add value to our practices and to the children and young people and communities we serve, we will champion the following core principles:

- The safety and wellbeing of the children and young people we serve in every action taken by the Trust and its constituent members.
- A caring, community-centered ethos throughout the Trust, cherishing every individual child and young person.
- Excellence in academic terms but also in providing a broad education beyond qualifications – to be 'Outstanding' in all we do.
- We will ensure the effective use of resources for the benefit of all children and young people in the Trust.
- We are committed to every child and young person in the Trust; we celebrate diversity and will work to narrow any gaps in aspiration, achievement or attainment within our community.

Our Employee Benefits

- The Trust offers a Pension Scheme for all our employees to access in order to help plan for their retirements.
- We are committed to offering flexible employment opportunities enabling staff to strike a sensible balance between home and work life. Wherever possible, we are open to discussing a range of flexible working options including reduced/compressed hours; remote working; flexible start and finish times.
- We offer a robust and supportive induction, peer support and a comprehensive programme of professional development, we pride ourselves on the achievements of our colleagues as professional members of our community. We offer dedicated training days for all staff and support employees in attending external courses and gaining professional qualifications where permissible.
- Employees are entitled to register for our cycle to work and computing schemes, where you are able to purchase bikes and the latest IT equipment and mobile phones with convenient monthly payments automatically deducted from your salary. Make NI savings and spread the cost over a period of 12 months.
- We have an employee assistance programme which is available to all staff and immediate family members. As part of this, employees have access to our health and wellbeing portal, provided by Health Assured, which includes free face to face counselling and telephone support for a whole variety of issues, worries and concerns.
- The Trust offers Occupational Maternity, Paternity and Adoption Schemes where you may be entitled to enhanced occupational leave and pay.
- The Trust offers generous annual leave entitlement to all whole year Support Staff with a minimum of 22 days to a maximum of 33 days plus 3-5 local days at Christmas and 8 bank holidays. All entitlements are pro-rata for part time positions.
- Free eye tests and discount vouchers available to use at Specsavers.
- Each academy has an on-site Canteen together with various areas where you can sit and enjoy your breaks and host visitor/team meetings etc.



health assured

Advert

The Potteries Educational Trust is a growing Multi Academy Trust, working collaboratively with educational institutions from across Stoke on Trent, Staffordshire and beyond, seeking to improve outcomes for all children and young people in the region. The Trust is a vibrant Learning Community working to maintain and develop excellent and innovative teaching and learning. The Trust seeks to deliver high quality parental engagement, pastoral support and the pooling of resources and expertise to achieve an Outstanding learning experience and outcomes for all our children and young people. Institutions work together to foster high quality academic and pastoral support, utilising the best elements of educational research in moving existing strong practice to outstanding in every sense.

Chief Financial Officer

Part-time (0.4fte – 0.6fte)

Benefits include enhanced annual leave, pension scheme, free on-site parking

We are seeking a highly skilled, inspirational finance professional, who is adept at building strong positive relationships with a variety of stakeholders, and has the ability to foster respect and trust easily. You will have excellent communication skills and the ability to win support for new ideas and concepts through effective advocacy skills.

The Chief Financial Officer will provide strategic leadership to the CEO and Trust on all finance matters, including financial audit, compliance and risk management. The post holder will maintain the excellence of our Finance Team as the Trust grows and will have excellent knowledge of the principles and methods of financial control and reporting, excellent leadership skills, and the ability to demonstrate strategic financial planning and management.

The post holder will assist the Board in their wide responsibilities ensuring compliance in accordance with statutory and legal requirements, as well as being responsible for managing the efficient and effective provision of operational, business and support management activities within the Potteries Educational Trust.

As a key member of the central team, the CFO will play an important part in setting and achieving the PET strategy. Reporting to the Chief Executive Officer and Board of Trustees, the CFO will work closely with the other members of our central team, to ensure effective Trust leadership that best serves the children and young people in our communities.

The Trust is committed to offering flexible employment practices enabling staff to strike a sensible balance between home and work life. For this role we are open to discussing the possibility of a range of flexible working patterns, e.g reduced/compressed hours; remote working; flexible start and finish times. Please feel free to discuss this at the selection stage and we can explore what is possible for the role whilst ensuring we meet the business needs of the Trust.

If we receive a high volume of applications, we reserve the right to close any vacancies from further applications. Please ensure you apply without delay if you wish to be considered for this role.

For further details and an application form please visit the Trust's website: www.potteries.ac.uk, or email HR@potteries.ac.uk. Alternatively, telephone Human Resources on (01782) 854210.

The Trust is committed to Equal Opportunities. Applications are particularly welcome from members of the ethnic minorities who are currently under represented at the Trust.

The Trust is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment. In line with Keeping Children Safe in Education, an online search will be conducted as part of our due diligence checks on all short-listed candidates. An enhanced DBS Disclosure will be required prior to taking up an appointment with the Trust.

Job Description

JOB DESCRIPTION Chief Financial Officer

SALARY:	Scale SFC Leadership 17-20, £80,383 - £86,313 per annum (pro rata for part time)
LOCATION:	Trust offices plus travel to trust organisations for meetings
REPORTS TO:	Chief Executive Officer
TRUST COMMITTEE:	PET Finance and Resources Committee
RESPONSIBLE FOR:	Academy Trust Finance Manager
DURATION:	0.4 - 0.6 FTE, Full Year, Permanent

This job description is not a comprehensive definition of the post. Discussions will take place on a regular basis to clarify individual responsibilities within the general framework and character of the post as defined below.

POST OBJECTIVE

- The Trust Chief Financial Officer will play a major role in the strategic development of the Potteries Educational Trust, taking the overall responsibility for leadership and management of finance for the Trust.
- The post holder will ensure compliance with all financial, legal and statutory duties, whilst developing and maintaining an effective and efficient approach to business and financial management across the Trust. You will prepare timely, accurate and appropriate reports and financial forecasts for the Trust, reporting to the Chief Executive Officer, Local Governing Bodies, Board of Trustees, Headteachers/Principals and external bodies as required.
- To support in leading the Trust's business operations, the post holder will be central to implementing and sustaining the organisational structure that will support the educational standards and values of the Potteries Educational Trust.
- To work with the CEO and within the Executive Leadership Team to develop outstanding leadership of key operational areas, ensuring all statutory and trust policies, procedures and requirements are met.
- To deputise for the CEO as required

MAIN DUTIES AND RESPONSIBILITIES

Strategic Management

- Formulate and contribute to the strategic planning of the MAT establishing the policies and plans through which they will be achieved.
- Providing specialist advice and support in relation to the academy sector and upcoming developments to enable the CEO and other leadership groups to be proactive in strategic development.
- Identify and develop strategies and options in all non-teaching operations that will contribute to the overall effectiveness and efficiency of the Trust, such as exploring internal synergies, and opportunities for partnership and collaborative working.
- Manage and lead staff towards achievement, including providing a leading role in staff meetings and training opportunities.
- Provide specialist advice and guidance to the Board, committees, and CEO as required.
- Liaise with relevant stakeholders in promoting the Potteries Educational Trust and organise and manage necessary business meetings and presentations in relation to prospective partners.
- Liaise with the CEO, and other relevant staff as appropriate in organising strategic events.
- Have access to appropriate legal advice, support and guidance, and where necessary seek advice and guidance from third parties on behalf of the Trust.

Financial Management

- To provide strategic leadership to the Trust on finance, audit, compliance and risk management, assuming ultimate responsibility for the financial management of the Trust. To maintain the MAT's risk register taking oversight of areas linked to financial matters.
- To maintain the accounting records and financial systems of the Trust and its Academies.
- To ensure that all income and expenditure is properly accounted for, and that value for money is achieved when expenditure is incurred.
- To consolidate and present the Trust annual budget working with the CEO and Headteacher/Principal's in the process.
- To develop and maintain appropriate financial management information and management accounting systems to ensure that relevant, timely and accurate financial data and financial analyses are available to the CEO, Trustees, senior leadership teams and all other budget holders in the Trust.

- To keep analyses of costs and other statistical information, such as key performance indicators, Government agency data collection reports, etc.
- To produce monthly, termly and annual reports for the MAT Board and LGB's on matters of Finance.
- Preparation of financial forecasts and year-end financial statements and timely completion of statutory returns to the ESFA and other funding agencies. Oversee financial reporting at all levels across the MAT through timely and accurate financial monitoring reports, including Management Accounts for all internal and external parties.
- Ensure full compliance of the financial aspects of running the Trust in accordance with the Academy Trust Handbook and the Funding Agreements and ensure that financial processes comply with standards set by the DFE / ESFA.
- To lead on the financial due diligence for joiner schools ensuring minimisation of any risk to the Trust.
- Promote a culture of value for money and excellence in resource management ensuring full compliance with procurement regulations.
- Challenge expenditure and investment decisions and support robust corporate governance.
- To ensure the provision of adequate and appropriate internal and external audit functions and ensure that they provide appropriate support and advice to the CEO and Audit and Risk Committee.
- Actively explore additional funding streams for the Trust, develop and prepare capital funding bids as appropriate, interpreting criteria and advising colleagues within the Trust to identify future requirements.
- To establish a high level of credibility and manage strong working relationships within the organisation and external partners, e.g. ESFA, auditors, bankers, Companies House, pension providers.
- Optimise the benefit to the Trust of funding from grants and other sources, preparing grant applications as necessary and maintaining appropriate records of grant related expenditure and managing submission of grant claims.
- To provide strategic management of Trust financial functions, ensuring compliance with funding body rules and statutory requirements.
- To support the CEO and Headteacher's/Principal's in the preparation of the five-year financial plan for relevant Academies and central Trust.
- To liaise with Academy Finance and Business Managers on the daily running of Finance teams and processes.

- To advise the Principal and Governors on the financial implications of changes in legislation or funding regulations which impact on the financial management of the Trust.
- To oversee banking arrangements and ensure that suitable banking facilities are in place to support the financial operation of the Trust, maintaining key links with bank officials in support of this facility.

Leadership and Strategy:

- Work with the CEO and Board of Trustees to set strategic goals and objectives for operational functions.
- To work with the Central Services Team to ensure a joined-up approach in all service areas across the trust and to implement the Trust Strategic Objectives.
- Provide guidance to executive leadership.
- Monitor and report on key performance indicators related to Finance
- Drive continuous improvement initiatives, process efficiencies, and cost-effective practices.
- Undertake any other professional duties as reasonably delegated by the CEO.

Key Documents

- PET Strategic Plan
- PET Risk Register
- Academy Trust Handbook

Other

- Promote harmonious relationships within the Trust and to maintain relationships with organisations representing all members of the Trust's workforce.

PERSON SPECIFICATION

ATTRIBUTES	CRITERIA	ESSENTIAL	DESIRABLE	ASSESSED BY <i>(Application, Task, Interview)</i>
Education & Qualifications	Professional accountancy qualification.	✓		A
	Degree in Business and Administration, NCSL Diploma in School Business Management, or equivalent qualification or experience in relevant discipline.		✓	A
	Leadership and Management qualification or equivalent level of experience.		✓	A
Experience	Strategic financial planning and management, including budget setting and income generation in an Academy or other similar organisation	✓		A, I, T
	Experience of working with a range of external partners.	✓		A, I
	Experience of producing financial and management accounts and budgetary control.	✓		A, I, T
	Sound knowledge of educational systems.	✓		A, I, T
	Experience of working at a senior management level.	✓		A, I
	Commercial and business acumen.	✓		A, I, T
	Management of contracts, bidding and tendering systems.	✓		A, I, T
	Experience of working in an educational setting.			✓
Knowledge / Skills	A strategic thinker able to demonstrate a business focus and commercially minded approach.	✓		A, I, T
	Experience and ability to manage, develop and motivate staff.	✓		A, I, T
	Ability to win support for new ideas and concepts through effective advocacy skills.	✓		A, I
	The ability to translate a visionary/innovative concept into a practical implementation plan.	✓		A, I
	Knowledge of current legislation affecting such items as accounting requirements, taxation, payroll, pensions and VAT.	✓		A, I, T

	Excellent numeracy and literacy skills	✓		A, I, T
	Highly developed interpersonal skills and ability to establish effective working relationships with a wide range of partners.	✓		I
	Understanding of relevant financial, health & safety, education and its impact on multi academies.	✓		A, I, T
	Evidence of and commitment to continuing professional development.	✓		A
	An understanding of the academies agenda and funding & financial management arrangements for academies including ESFA reporting requirements.	✓		A, I, T
	Ability to speak confidently to a wide range of audiences	✓		I, T
	Comprehensive proficiency in various related computer packages	✓		A, T
Behavioural Attributes	A commercially astute and articulate influential leader with the ability to operate at both strategic and operational levels.	✓		A, I, T
	A balanced approach to the assessment and management of risk.	✓		A, I, T
	Ability to build good relationships and trust with senior management and staff across the Trust as well as external stakeholders.	✓		I, T
	Ability to communicate technical information effectively to a non-specialist audience.	✓		I, T
	Identifies the service needs of the pupils, parents, the community and other stakeholders by proactively gathering feedback to ensure the business delivers to the diverse needs of its customers and encourage social inclusion		✓	A, I
	Ensures main strategic priorities are translated into clear objectives and practical actions ensuring resources and activities of teams are aligned for day to day strategic priorities.	✓		A, I, T
	Accurate and well organised approach to work maintaining a calm and authoritative manner	✓		I

	Manages demanding workloads and competing deadlines	✓		A, I, T
	Drives the agenda to secure value for money on goods and services	✓		I, T
	Anticipates the need for change and proactively introduces systems to support the transition.	✓		I, T
	Maintains a clear sense of purpose and direction during periods of change particularly in the finance sector of the business, proactively consults with others when planning change and supports others during transition.	✓		A, I, T
	Ability to interpret legislations and regulations	✓		A, I, T
	Plans communication effectively and acts as a role model in providing open and constructive communication.	✓		I, T
	Ability to negotiate and find solutions overcoming any obstacles whilst retaining the commitment of involved parties		✓	I, T
	Analytical and flexible thinking	✓		I, T
	High levels of motivation, creates a sense of self belief, energy and pride in others about what the MAT is setting out to achieve	✓		I, T
	Manages performance robustly within an inclusive working environment that values everyone's contribution, coaches others in developing and maintaining effective relationships and team working.	✓		I, T

The Potteries Educational Trust is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment. All employees are subject to an enhanced DBS (CRB) Disclosure prior to taking up an appointment with the Trust.