

Batley Multi Academy Trust - Job Description

Trust/School Post:	Trust
Department:	Trust Executive Team
Post:	Chief Financial Officer (CFO)
Grade:	Executive Pay Scale - Circa £74,000 per annum
Accountable to:	Chief Executive Officer and Board of Trustees
Responsible for:	Finance Team Operations Director
Purpose of Job	
<p>The CFO will be responsible for ensuring that the financial systems, policies, and procedures of the Trust are compliant with regulatory and statutory requirements, and that financial resources are managed effectively and efficiently to support the delivery of the Trust's objectives.</p>	
Responsibilities	
<ul style="list-style-type: none"> • Work closely with the CEO and Board of Trustees to develop and implement the Trust's financial strategy, ensuring alignment with the Trust's overall vision and mission. • Provide leadership and guidance to the finance team and oversee the development and delivery of the Trust's financial policies and procedures. • Ensure that financial resources are allocated appropriately across the Trust's academies, taking into account the specific needs of each academy and the Trust as a whole. • Provide accurate and timely financial information to the CEO, Board of Trustees, and other stakeholders, including financial forecasts, management accounts, and budgets. • Manage the Trust's cash flow and investment activities, ensuring that sufficient funds are available to support the Trust's ongoing operations and strategic objectives. • Oversee the Trust's procurement activities, ensuring that best value is achieved in all purchasing decisions. • Ensure that the Trust's financial systems and processes are compliant with relevant regulatory and statutory requirements, including those set out by the DfE and ATH. • Ensure that the Trust meets the deadlines set by the DfE and other government departments for the submission of any relevant return e.g. AAR, BFR/BFRO, LBCT etc. 	

- Act as the primary point of contact for the Trust's auditors and ensure that all audit requirements are met for external and internal audit.
- Develop and maintain effective relationships with external stakeholders, including banks, auditors, and other finance professionals.

Wider duties:

- Providing strategic advice to the CEO, Board of Trustees, Trust Headteachers and senior leaders/managers on all issues relating to financial and operational matters.
- Be responsible for establishing an effective and cohesive operational strategy, directing all central support departments in its delivery.
- Ensuring successful evaluation, planning and delivery of all Trust business operations including compliance, feasibility, risk, opportunities and overseeing business cases for CEO/Board consideration.
- Ensure that there is a robust and up-to-date Trust Business Continuity Plan.
- Ensure that there is a robust and up-to-date Trust Risk Register.
- Ensure that all key policies are in place, as per the Scheme of Delegation.
- Building close and effective working relationships with key partners including the Chair of Directors and the Chair and members of the Finance, Resources and Audit Sub Committee.
- Participate in the management of major Trust projects as required by the CEO.
- Ensure robust, cohesive systems are in place to support the day-to-day operations of the Trust and, in doing so, ensure our schools receive the very best support that is possible allowing them to concentrate on what they do best: teaching and learning.
- Manage the professional development, appraisal and training for colleagues within the finance team within the Trust central team. This may increase when other managers are added to the team as the central team grows.

Strategy and change

- Work alongside the CEO to develop and implement 3-year rolling Strategic Plans including: setting and managing budgets, KPIs, targets and outputs and reviewing progress against these.
- Support other members of the Trust Executive Leadership Team in the development of functional strategies and plans.
- Work with the CEO and Trust Executive Leadership Team to effectively manage change within the Trust.
- Work with the CEO, and COO, on the strategies for premises improvements and health and safety across the whole Trust.

- Work alongside the Trust's COO in leading the facility management across the whole Trust.
- Support the COO with Trust-wide bid writing to secure external funding for projects, as required, including building works, in line with the Trust's strategic plan and building development plans.
- Work alongside the Director of People and Talent in leading the HR provision across the whole Trust.
- Support with facilitating the design of new initiatives with the Trust Executive Leadership Team and implementation across the Trust.

Business planning and performance reporting

- Manage the annual and 3-year strategic business planning to produce an effective budget for approval by the Board of Directors, including: implementation of CLFP, the Trust's building development plans, a long-term IT strategy and consider other initiatives such as GAG pooling throughout the Trust.
- Manage the implementation and maintenance of strong strategic and operational financial planning processes and controls to safeguard the Trust's finances.
- Ensure that all necessary monitoring and evaluation of finance and performance is undertaken across the Trust and reported to the Finance Audit & Risk committee, Board of Directors and the School Governing Boards (SGBs) as necessary.
- Ensure the risk register identifies the correct areas of risk and mitigations are put in place to address risks identified concerning finance and operations.
- Direct the production of the annual report and accounts, including the statement of financial activities, balance sheet and associated notes to the accounts.

Business Management

- Lead the drive for efficiency throughout the Trust.
- Lead on effective risk management across the Trust, working closely with other Executive Team members and school leaders.
- Lead as the primary point of contact, inclusive of: Finance, Operations, IT, Payroll, Procurement, VAT, risk and legal departments to ensure Trust wide administration is efficient and effective.
- Understand the effects and implications of government policies, legislation and directives and develop effective strategies for current initiatives and long-term educational trends and developments.
- Negotiate, manage and monitor contracts, tenders and agreements ensuring 'best value' at all times.

- Ensure appropriate levels of insurances are in place to fully capture the needs of all the establishments within the Trust.
- Ensure that the Fixed Asset Register and depreciation schedules are in place.
- Ensure that the Trust manages its cash position robustly and avoids becoming overdrawn on any of its bank accounts, so that it does not breach restrictions on borrowing.

Financial management, monitoring and compliance

- Provide strategic oversight and guidance to all finance colleagues across the Trust.
- Oversee the day-to-day financial and operational management of the Trust, including budgeting, monitoring and risk management, ensuring all establishments with the Trust are strategically planning and delivering.
- Prepare management accounts every month for Trust leaders and Trustees.
- Prepare longer-term budget plans which identify risks and actions the Board of Trustees can implement to ensure the Trust remains a 'Going Concern'.
- Review and interrogate underlying assumptions, such as pupil number estimates, to ensure they are realistic and accurate.
- In line with the Academy Trust Handbook, ensure that all financial regulations, schemes of delegation and financial procedures are fully adhered to and reviewed and updated as required by the DfE, Charity Commission, HMRC and other regulators.
- Provide accurate information as required by the DfE, the Charities Commission or other official body in a timely and professional manner.
- Direct the preparation of budgets and monitoring in line with the Funding Agreements established between the Trust, and the schools and nurseries.
- Lead the due diligence process for any future opportunities in terms of growth and expansion of the Trust.
- Oversee all internal and external audits, building effective working relationships with relevant audit teams.
- Implement appropriate audit and control measures and maintain relationships with auditors and bankers.
- Take part in regular continued professional development to keep up to date with the latest ways of working with regards to financial management and compliance.
- Act as the Trust governance company secretary in order to remain satisfied we are meeting statutory duties of compliance and submitting reports to Companies House as required.

- Where DfE approval is required for Trust decisions, take responsibility for ensuring that the Trust complies with its statutory obligations.

Preparation and audit of accounts

- Ensure the Trust maintains adequate accounting records and prepares an annual report and accounts in line with the Charity Commission's Statement of Recommended Practice (SORP) and Academy Accounts Direction.
- Ensure Members and Trustees comply with regulations for appointing and removing external auditors.
- Provide external auditors with all the information that they need to prepare the annual accounts.
- Lead the production of the Trust's annual report, working closely with the CEO and Trust Executive Leadership Team.

Additional Information

- Help the Trust's family of schools work successfully together in a climate of mutual challenge and support.
- Where appropriate, establish and maintain working relationships with fellow professionals and colleagues across the country to provide and seek advice and guidance as necessary.
- Undertake any such duties commensurate with the post as directed by the CEO/Board.
- As part of the wider duties and responsibilities, the post holder is expected to promote and actively support the school's and Trust's responsibilities towards safeguarding.
- A strong knowledge and understanding of the Data Protection Act 2018 and a willingness and commitment to ensure compliance of this and any associated data-related legislation.
- Create a culture that allows colleagues and all young people to be open and honest about issues affecting them and put in place actions to support them. Ensure related policies are robust to provide the appropriate interventions and support.

Batley Multi Academy Trust - Employee Specification

Post: Chief Financial Officer	Grade: Circa £74,000
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Please carefully read the notes of guidance enclosed with the application form and provide information to help us decide whether you meet the criteria below.

Qualifications, Skills, Experience	Essential/ Desirable	Method of assessment
Professional finance or finance related qualification at graduate level (i.e. ICAEW, ACCA, CIMA, CIPFA – including CIPFA qualifications developed in partnership with ISBL).	Essential	Certificates
Extensive relevant post qualification experience and in-depth professional knowledge.	Essential	Application Form
Experience managing significant financial resources with a good appreciation of relevant regulatory frameworks.	Essential	Application Form/ Selection Process
Good understanding of financial processes and procedures.	Essential	Application Form/ Selection Process
Significant experience of effectively managing staff and developing a team.	Essential	Application Form/ Selection Process
High level of IT competence, literacy and numeracy skills.	Essential	Selection Process
Experience of compiling and effectively managing budgets in a multi-site environment.	Essential	Application Form/ Selection Process
Experience of communication with colleagues and contractors at all levels of the organisation and the ability to negotiate and act on behalf of the trust in relation to contracts.	Essential	Application Form/ Selection Process
In depth knowledge of statutory requirements, procedures and regulatory requirements relating to academies.	Desirable	Application Form/ Selection Process
Experience of using and supporting others in the use of education financial software packages, such as knowledge of Civica FinancialsLIVE and Access.	Desirable	Application Form/ Selection Process
Experience of managing payroll processes and HR within a similar role.	Desirable	Application Form/ Selection Process
Knowledge and experience of acquiring grant funding.	Desirable	Application Form/ Selection Process

Experience in project management.	Desirable	Application Form/ Selection Process
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Performance Attributes <i>Please note, all the following criteria are essential</i>	Method of assessment
Commitment to Keeping Children Safe in Education and highly effective educational development of children.	Selection Process
Focuses on the needs and satisfaction of young people as the key customers of our Trust, setting high standards and expectations for quality of education, monitoring and maintaining those standards and consistently striving to achieve Trust goals so that all young people are able to succeed and achieve.	Application Form/ Selection Process
Works strategically to realise Trust goals by working collaboratively with other stakeholders including the wider Executive Team and the Board of Trustees to set and develop the Trust strategy.	Application Form/ Selection Process
A dynamic leader who upholds ethics and values aligned to the Trust and the regulatory framework within which the Trust operates. Takes organisational and individual responsibility and accountability seriously at all times.	Selection Process
A leader who demonstrates integrity at all times and who promotes and defends equal opportunities for all and demonstrates a commitment to inclusion for staff and young people.	Application Form/ Selection Process
An exceptional leader who can adapt to changing circumstances, accepting new ideas and change initiatives as appropriate. A leader who can adapt their interpersonal style to suit different people or situations.	Application Form/ Selection Process
Makes prompt, clear decisions which may involve tough choices or considered risks and takes responsibility for actions, projects and people. Acts with confidence and initiative, generating activity from others.	Application Form/ Selection Process
Establishes good relationships with everyone they encounter, relating well to people at all levels (including young people) and builds a wide and effective network of contacts inside and outside the Trust.	Application Form/ Selection Process
A leader who makes a strong personal impression on others and who can gain clear agreement and commitment from others by persuading, convincing and negotiating. Makes effective use of political processes to influence and persuade stakeholders.	Application Form/ Selection Process

Gathers comprehensive information to support decision making through own research and networking. Actively encourages others to learn from successes and failures in order to help inform continuous improvement.	Application Form/ Selection Process
An innovative leader who is readily available with new ideas, approaches or insights to help the organisation move forward.	Application Form/ Selection Process
A leader who uses their knowledge of the sector to identify commercial opportunities for the organisation (e.g. opportunities to make bids, self-generated income opportunities).	Application Form/ Selection Process
A dynamic leader, able to combine our Trust values with cutting edge business practices and horizon scanning for opportunities to support our strategic educational priorities.	Application Form/ Selection Process
Evidence of maintenance of continuing professional development and a proactive approach to relevant ongoing training.	Application Form/ Selection Process
Driving licence and own transport.	Application Form
Capable of multitasking, problem solving and delivering to strict deadlines.	Selection Process
Exceptional interpersonal and communication skills.	Selection Process
Capable of delegating, motivating across different areas and guiding team effort towards efficient productivity and meeting objectives.	Application Form/ Selection Process
A keen, positive and enthusiastic team player.	Selection Process