

Chief Financial Officer

Candidate information pack



PONTERFRACT
ACADEMIES TRUST

A message from the CEO

Thank you for registering your interest in joining Pontefract Academies Trust – we are delighted to provide you with an application pack. It is hoped that the information provided will be of interest and help you with your application process.

Pontefract Academies Trust is a cross phase Multi Academy Trust comprising of eight schools: six primaries and two 11-16 secondary schools. The Trust is a medium sized family of schools all located within a tight geographic hub within Pontefract. Pupils are drawn from the local community that includes a mix of different catchment areas.

As the Chief Executive Officer of the Trust I am truly excited by the opportunity of leading the Trust to the next phase of its development. The Trust is part way through a journey of school improvement. Pace and a trajectory of improvement is the unwavering expectation. The last 12 months has seen this expectation become a reality. Our six primary schools have delivered their best ever SATs outcomes. In addition, our two secondary schools have obtained their best ever outcomes; the Trust has also moved one of our secondary schools from special measures to a 'good' Ofsted judgment inside twelve months. The transformation of our schools has truly started. Our challenge remains to improve outcomes for all but specifically for disadvantaged pupils. In a socially just society, all children must have a fair chance to learn and thrive. We have made strides but not enough and we do not want our children and young people falling through the cracks.

Simultaneously, our central services and infrastructure that underpins our core business has been subject to change. Human Resources, Finance, ICT and Estates are all functions that we have started to align and centralise. The alignment and centralisation of back office functions is to bring economies of scale, financial gains and greater flexibility. Importantly, it frees up our school leaders to focus upon driving up standards in their schools and not be

distracted by non-core activities that can be dealt with by specialists. Despite the Trust being in existence for five or six years, these areas are still in their relative infancy and have not reached their full potential yet. This area remains a major priority and we aim to continue to remove distractions from our leaders and teachers, so that they can deliver on our mission. The post of Chief Financial Officer can have real impact here.

The post of Chief Financial Officer is a very exciting one as the Trust moves to the next phase of its life cycle. We are looking for someone that strongly fits with our values and guiding principles. You will be a strategic thinker, and someone with good judgment. Whilst possessing strong technical ability, we are keen to appoint someone who can link strategy to execution and provides perspective and insight. You will see the budget as the servant of the organisation's strategy, be outward facing and build strong relationships with school leaders and external stakeholders. Obviously, as a Trust we know that budgeting and strong financial processes are one crucial element of the Trust's responsibilities. The importance of making sure that resource is allocated where there is most need and that the oversight of over and underspend is clear. However, we are looking for someone to join our executive team who sees strategic investment and resourcing as an all-pervading role that is essential to sustainability and successful organisational growth.

We look forward to hearing from you and exploring your future with us through our selection process. Yours faithfully,

**Julian Appleyard OBE,
Chief Executive Officer,
Pontefract Academies Trust**



**Julian Appleyard OBE,
CEO**

Chief Financial Officer

Location: Pontefract
Salary: £70,000 - £80,000pa (negotiable for exceptional candidates)
Hours: 37hrs per week



Pontefract Academies Trust has six primary and two secondary schools with a mission of running top quality, high achieving schools that give the children and young people the chance in life they deserve. The Trust's vision is to ensure that every child and young person makes outstanding progress through their school journey.

The job

As a member of the Executive Leadership Team, the Chief Financial Officer will have responsibility for all aspects of Trust finance. Delivering operational rigour and strategic direction, the CFO will play an integral role in supporting the growth and development of Pontefract Academies Trust and ensure it continues to be financially sustainable. The CFO will lead strategically, and operationally to provide excellent financial leadership, guidance and stewardship as the Trust develops into the future. Not only will this role own the day-to-day numbers and provide insight to commercial decision making, the CFO will continue to build upon and embed a culture focused on working as a proactive member of the executive across the Trust, driving internal excellence.

The person

Pontefract Academies Trust CFO will need significant senior financial management and strategic leadership either in the public or private sector with accountability for a complex resource base.

Alongside exceptional technical ability you will be a strategic thinker with experience of building and empowering strong agile teams that engenders a positive collaborative and collegiate culture, sustaining high performing teams that engage with colleagues across the Trust.

You will need diplomacy, openness and approachability and a personable style of strategic leadership and resource management as well as the ability to converse with internal and external stakeholders with integrity.

To apply, or for further details, please contact Paula Barber, Client Director, Brewster Partners Recruitment Group on 0114 399 0590, or email: pbarber@brewsterpartners.co.uk

Brewster Partners Recruitment Group Sheffield
Velocity V1, 1st Floor, Tenter Street, Sheffield S14BY
T: 0114 399 0590 E: info@brewsterpartners.co.uk



Pontefract Academies Trust at a glance

Pontefract Academies Trust is a cross phase Multi Academy Trust comprising of eight schools: six primaries and two 11-16 secondary schools.

The graphics below provide a quick overview of the Trust. What underpins the numbers is the determination to have, at the centre of our work, the need to give every child and young person in our schools, a fair chance to learn and thrive. As a family of schools, we believe that this will come through equipping

them with a strong set of qualifications and the experience of life enhancing opportunities, in areas such as the arts, sport and travel. It is our job, as an education trust, to pick up an important role for social equity and not allow poverty of ambition to get in our way.



Ofsted Judgements

| | | |
|--|----------------------|---------------|
| Carleton High School | Good | July 2019 |
| The King's School | Good | June 2017 |
| Carleton Park J & I School | Good | July 2019 |
| De Lacy Pontefract Primary School | Requires Improvement | January 2020 |
| Halfpenny Lane J, I & N School | Good | February 2019 |
| Larks Hill J & I School | Good | June 2019 |
| Orchard Head J, I & N School | Good | November 2019 |
| The Rookeries Carleton J, I & N School | Requires Improvement | March 2019 |

MISSION

Running top-quality, high-achieving schools that give our children and young people the chance in life they deserve.

VISION

Where every child and young person makes outstanding progress.

GUIDING PRINCIPLES

01

Achievement without excuses

We have an unwavering focus on achievement. This is paramount so that all of our children and young people enjoy greater life chances.

We take responsibility for ensuring that they succeed. We own our own performance and do not rest on our laurels or seek to blame others.



Job description

| | |
|----------------------|--|
| Post: | Chief Financial Officer (CFO) |
| Position: | Member of the Executive Leadership Team |
| Reporting to: | Chief Executive Officer |

Purpose:

As a member of the Trust Executive Leadership Team, the Chief Financial Officer will have responsibility for all aspects of Trust finance. Delivering operational rigour and strategic direction, the CFO will play an integral role in supporting the growth and development of Pontefract Academies Trust and ensure it continues to be financially sustainable. The CFO will lead strategically, and operationally to provide excellent financial leadership, guidance and stewardship as the Trust develops into the future. Not only will this role own the day to day numbers and provide insight to commercial decision making, the CFO will continue to build upon and embed a culture focused on working as a pro-active member of the executive across the Trust, driving internal excellence and growth.

Accountable to:

Chief Executive Officer (Accounting Officer)

Accountable for:

Overall performance of Pontefract Academies Trust centralised finance function including line management as identified.

Line management, professional development and support to:

Centralised finance team and potentially senior roles. The operational rigour and strategic development of the financial organisation across the Trust. Ensuring services are high quality and enable Headteachers to focus on teaching and learning and raising standards.

Finance, Audit and Risk

- To ensure that the Trustees comply with their obligations and responsibilities as set out by the ESFA in the latest version of the Academies Financial Handbook.
- To advise and support the CEO in the financial aspects of their responsibilities as the Trust Accounting Officer.
- To ensure that all financial processes are compliant with the requirements of the Academies Financial Handbook and Companies House and operate under appropriate schemes of delegation which follow best practice in all aspects of financial governance.
- Provide leadership to the Board on finance, audit and risk strategy to optimize the financial performance and strategic position of the Trust.
- Contribute fully to all areas of Trust strategy and provide financial analysis and guidance on all activities, plans and targets.
- Ensure that infrastructure services are of high quality and well-led, cost effective and efficient, and enable schools to focus on the quality of education.
- To ensure a successful approach to the pooling of the General Annual Grant (the amalgamation of central funding) that achieves a strategic, needs-led approach to resourcing, promoting the ethos of one trust looking after all pupils' interests.
- Use analysis and complex financial information in relation to the Trust to develop solutions, plans and strategies that create medium, and long-term success.
- To provide confidence to constituent schools that they will receive help in the future if needed, strengthening the sense of collaboration.
- Create, drive and manage improvement programmes to aid operational efficiency.
- Develop, oversee and own the quality of management information, budgeting and forecasting processes.
- Ensure that the Board and Executive Leadership Team have regular and accurate information to manage delegated budgets, providing professional advice and assistance as required.
- Establish a high level of credibility within the organisation and manage positive working relationships with external partners including the ESFA, HMRC, DfE, external auditors, Companies House, The Charity Commission, local authorities, legal advisors, bank and pension fund providers.
- Continually review and improve the existing financial systems and policies ensuring they are streamlined, efficient robust, compliant and support current activities and future growth.
- Develop a robust approach to internal scrutiny and management of the external audit process, acting as a conduit between Trustees and the audit teams.
- Lead on the Trust's approach to risk management and coordinate the strategic risk registers.
- Manage the development of financial reporting systems (including KPI dashboard).
- To provide financial management reports to the Board of Trustees, Finance Committee, Risk and Audit Committee, and DfE/ESFA Reviews.
- To be responsible for the preparation of the annual accounts to prescribed standards, taking responsibility for the completion and submission of statutory/regulatory reporting in line with prescribed timelines.



GUIDING PRINCIPLES

02

Our people matter

We know that our people make a difference to the lives of our 3 - 16 year olds. We want to make our schools places where great teachers want to teach, lead and build a career. Investment in the recruitment, development and retention of the best people is a top priority.

We aim to provide professional working environments, where our people have the support and the tools to do a great job, and push our children and young people to scale new heights in a safe and secure environment.



Job description (continued)

- Ensure completion and submission of statutory returns to defined timescales.
- Procure external agencies to deliver agreed aspects and requirements i.e. audit function.
- Manage the service effectively and efficiently to deliver high quality financial support to the Trust and its academies.
- Provide challenge to senior leaders to ensure the management of resources are compliant and meet best value expectations.
- Ensure staff at appropriate levels are trained to ensure effective financial practice.

Payroll & Pensions

- Ensure arrangements for effective payroll & pension administrative systems and ensure compliance with all relevant and up to date legislation.

Procurement and Contract Management

- Own the procurement strategy and ensure all policies and procedures for buying and ordering supplies and services are robust, fully compliant and operate highly efficiently, generating economies of scale and value for money.
- To oversee the financial management of contracts to ensure maximum value for money across all activities and maintain a strategic overview of services.
- Advise the Trust on insurance requirements and make appropriate arrangements for insurance cover as required by the Trust.

Capital Planning and Asset Management

- Identify capital grant opportunities and oversee the preparation for capital grants and bids.
- Contribute to the preparation of a rolling programme of annual capital purchase plans.
- Produce and implement appropriate policies and procedures for the procurement, depreciation and disposal of all assets for the Trust.

Multi-Academy Trust (MAT) Conversion

- Undertake a lead role in supporting the conversion of new schools into the Trust.
- Audit all financial functions across the Trust and recommend new structures to meet evolving needs.
- Oversee due diligence for all financial and infrastructure aspects.

Banking and Treasury Management

- To be responsible for planning and coordinating all tax and treasury management practice and policies with reference to charitable status and cash management.
- To proactively manage the Trust's relationship with its bankers, to ensure that appropriate and efficient systems are in place for the Trust's accounting procedures.

Supplementary Support

- Be aware of, and comply with, policies and procedures relating to child protection, health and safety, confidentiality and data protection, reporting all concerns to the appropriate person.
- Contribute to the overall ethos, work, and aims of the Trust.
- Attend and participate in meetings as required.
- Participate in training and learning activities as required.
- Recognise own strengths and areas of expertise and use these to advise and support others.
- Other duties commensurate with the grade.
- Play an appropriate part in child protection procedures, such as relating relevant information and recording/reporting disclosures to the designated teacher/relevant professional.

Note

This job description is not necessarily a comprehensive definition of the post. It will be reviewed at appropriate intervals and may be subject to modification or amendment at any time following consultation with the post holder.

The post holder will be required to travel to any of the schools within Pontefract Academies Trust and attend meetings including with the Department for Education and the Education and Skills Funding Agency.

03

Excellence as standard

We set high standards. 'Good enough' is simply not. We do not accept second best from our pupils or ourselves.

The Trust aims to be a highly reliable school improvement organisation that is disciplined in its approach to improving performance. A Trust with clear plans and, simple and precisely executed systems, that not only develops and sustains excellent performance but never stifles individual flair.



Person specification

| Qualifications, experience, skills and knowledge required to deliver success in the role: | |
|---|-----------------------|
| Senior financial management and strategic leadership either in the public or private sector with accountability for a complex resource base | ✓ |
| Educated to degree level or equivalent with relevant professional accountancy qualification(s) | ✓ |
| Management experience at some scale and a track record of empowering strong and agile teams | ✓ |
| Strategic thinker and ability to exercise strong leadership | ✓ |
| Some understanding and an interest in education with a strong moral purpose | ✓ |
| Strong judgment and the ability to look at risk analysis through a commercial as well as financial lens | ✓ |
| Strong technical ability, but with the ability to: <ul style="list-style-type: none"> ■ link strategy to execution ■ drives analysis and provides perspective and insight ■ turn insights into action ■ encourages smart risk-taking ■ optimizes resource allocation | ✓ ✓ ✓ ✓ ✓ |
| Leadership style that engenders a positive collaborative and collegiate culture, sustaining high performing and effective teams that engage with colleagues across the Trust | ✓ |
| Experience of developing and managing external relationships with professional and regulatory bodies | ✓ |
| Knowledge and experience of establishing and providing effective management oversight of financial management systems | ✓ |
| Evidence of entrepreneurialism and innovation, with an ability to identify commercial opportunities to maximise income | ✓ |

| Personal attributes | |
|---|---|
| Outstanding professional profile with an excellent track record in financial leadership with strong leadership and interpersonal skills | ✓ |
| Analytical problem-solving capability with well-developed emotional intelligence, judgement and political awareness | ✓ |
| Resilience and ability to drive change, both through the finance team and across the Trust | ✓ |
| Highly effective communication skills and ability to influence and negotiate effectively | ✓ |
| Diplomacy, openness and approachability; a personable style of strategic leadership and resource management | ✓ |
| Highly energetic and a capacity to embrace new challenges | ✓ |
| Strength of character in collective decision taking to prioritise organisational priorities ahead of functional/service or personal interests | ✓ |
| Personal integrity, self-awareness and a commitment to personal development and self-reflection | ✓ |



GUIDING PRINCIPLES

04

Pupils come first

Our schools are run for the benefit of children and young people, not the ease of adults. Their achievement comes first and staff in schools and the central trust office work to this end.

The Trust aims to keep low priority tasks away from front line teachers and leaders so that they can focus explicitly on our core business of teaching and learning.



How to apply

If you want to be considered for the position, please contact Paula Barber (0114 399 0590), pbarber@brewsterpartners.co.uk and please supply the following:

- An up-to-date CV setting out your career history, with responsibilities and achievements, details of your current salary and benefits (in confidence) and preferred contact details.
- Details of two referees (from your employer). Referees will not be contacted without your prior consent.
- Proof of your eligibility to work in the UK.

All candidates whose CV reflects the requirements of the role will be required to have an initial face to face interview. (either in person or online).

The closing date for applications is 27th September 2020.

For an informal and confidential discussion, please call our retained consultants at Brewster Partners (Paula Barber on 0114 399 0590). Brewster Partners will, of course, respect the privacy of any conversations regarding this role.

Please send your application to Paula Barber at [**pbarber@brewsterpartners.co.uk**](mailto:pbarber@brewsterpartners.co.uk)

Recruitment timetable

These dates are indicative and may be subject to change (except the closing date for applications).

First round interviews may be held remotely over Zoom or another platform.

First round of interviews

Mid October

Second round of interviews

Mid October

Interview process

A selection process is not just about us appointing the right person for Pontefract Academies Trust – it is also about our candidates being able to make an informed decision about their future career with us.

The interview process will ensure that you have every opportunity to highlight

your skills, experience, ability and person fit for the role as well as give you the opportunity to get a feel for Pontefract Academies Trust.

If you are shortlisted, you will receive further details about the process.

05

Stronger as one

We take collective responsibility for each other and the results of all of our children and young people. We enjoy sharing our success as a Trust, while recognising the strengths of individuals and each school. To this end, collective accountability is rooted in a 'if one fails we all fail' mentality.

As a family of schools, we collaborate with each other, challenge each other and share best practice. We do not let competition get in the way of our desire to get the best outcomes for all.



Your personal information

Your personal information will be held in accordance with General Data Protection Regulations, the Data Protection Act 1998 and all other Data Protection laws. You will not receive unsolicited paper or electronic mail as a result of sending us any personal information. No personal information will be passed on to third parties for commercial purposes.

When we ask you for personal information, we promise we will:

- only ask for what we need, and not collect too much or irrelevant information.
- ensure that you know why we need it.
- protect it and, insofar as is possible, make sure nobody has access to it who shouldn't.
- ensure that you know what choice you have about giving us information.
- make sure we don't keep it longer than necessary.
- use your information only for the purposes you have authorised.

We ask that you:

- give us accurate information.
- tell us as soon as possible of any changes.
- tell us as soon as possible if you notice mistakes in the information we hold about you.
- read through our Candidate Privacy Policy to ensure you are fully informed about how we will process your personal data. This can be found at www.brewsterpartners.co.uk/candidate-privacy-policy

If you apply for a post, we will share some of the information you provide with the members of the selection panel for the post to which you apply, so that your application form and CV can be assessed. These individuals will usually be identified in the information pack.

How we will deal with your application

We will deal with your application as quickly as possible and will advise you of the likely timetable at each stage.

After the closing date for applications:

- Candidates selected at long list will be invited for interview by Brewster Partners. From these interviews, Brewster Partners will agree a shortlist of candidates for final panel interviews at a selection event at Pontefract Academies Trust. All candidates interviewed will be contacted with feedback by Brewster Partners.
- Where a candidate is unable to attend an interview on the set date, an alternative date will be offered only at the discretion of Brewster Partners.
- If, in the view of Brewster Partners, you have the skills for the post and are one of the best candidates, your name will be recommended to Pontefract Academies Trust, who will make the decision on final appointment.
- If you are unsuccessful, you will be notified by Brewster Partners and feedback will be offered.





Chief Financial Officer

Candidate information pack



Brewster Partners

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