

Chief Operating Officer

Recruitment Pack

**Start Date: January 2018**

Chester Diocesan Academies Trust

**Welcome from the Chief Executive Officer and Chair of the Board**

Welcome and thank you for your interest in the role of Chief Operating Officer working as part of our central team and within our academies. The Chester Diocesan Academies Trust (CDAT) is seeking an inspirational and innovative leader who will take full advantage of this chance to be part of a growing trust.

The role of Chief Operating Officer is a vitally important one which will have significant influence in further developing the work of CDAT and its ability to support its member schools.

Working closely with the CEO and Deputy CEO the successful candidate will continue to develop all the relevant financial and legislative frameworks, policies and working practices necessary for CDAT to flourish and grow as a quickly expanding successful Trust.

**A shared vision**

Intrinsic to our approach is the recognition that all schools are different with needs that emerge from their unique contexts. We work in partnership with the principals, local governors, staff, parents and carers to build long-term and sustainable excellence that will have a real impact, first for the children, but also for the staff and wider community. The support given by the COO to the business managers and finance staff in schools will support this work and enable headteachers and principals to focus on teaching and learning.

It is important to understand that this role will involve working with a variety of schools with some very small rural primary schools to much larger schools in an urban context. The ability to provide consistency but with the flexibility to understand the different challenges and needs within the schools is important.

If you believe you have the skills and expertise to make a significant contribution we hope that you will apply. We encourage applications from experienced school business managers or those with experience of working with educational establishments. The following information pack provides details specific to the Chief Operating Officer role.

We value your application and thank you in advance for your time in its consideration and submission. Please get in touch with the office on 01928 718834 if you would like any further clarification after reading this document.

Kind regards



Mr Chris Penn (CEO)



Canon Elizabeth Renshaw MBE(Chair)

**Context**

The Diocese of Chester covers a number of Local Authorities including all of Cheshire East, Cheshire West and Chester and Wirral and sharing Halton, Warrington, Trafford, Stockport, Tameside and Derbyshire. There are 116 Diocesan Board of Education (DBE) schools, ranging from small rural to larger urban schools. The vast majority are good and outstanding primary schools with six secondary schools and three schools shared with the Catholic Diocese of Shrewsbury.

Within this family, a group of DBE schools are now led (or about to be) through the Chester Diocesan Academies Trust (CDAT) as both sponsored and converter academies. The growth of CDAT has been undertaken in a measured way to ensure that its growth matches its capacity but it is now ready to expand more rapidly as it takes on further schools within its regional hub model.

CDAT is a Church Trust that is open to both church and community schools that are sympathetic to the Christian values that form the basis of the Trust. The Supplemental Funding Agreements signed by the Trust with the Secretary of State protect the previous character of schools, so community schools are not expected to take on Church status.

Whilst it is not an organisational requirement that the successful candidate should be a Christian, it is essential that all our members of staff agree to uphold the vision and values of the Trust and of the Church of England.

**Key issues to which CDAT is committed**

Going forward as a growing Trust, CDAT is seeking to build a staff complement (centrally and through academies) with the capacity to:

* Develop outstanding practice across every academy
* Intervene to support schools that are not providing the best outcomes for children
* Ensure that church schools within CDAT embed Christian Distinctiveness and all schools live out the CDAT vision and values
* Understand that the Trust is built from the ground up and work with schools to develop necessary policy and procedures
* Support the development of the hub model
* Lead school to school collaboration and development both for individual academy improvement and the good of all
* Enhance the educational and business offer currently available to academies
* Improve communication both internally and externally
* Deliver leadership development and succession and development for all staff
* Demonstrate clear accountability in business functions, educational provision and governance.
* Provide clear information and guidance to the Board on the effectiveness of individual academies and the Trust as a whole

**Job Description**

**Chester Diocesan Academies Trust (CDAT)**

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| **Job Title:** | **Chief Operating Officer** |
| **Salary:** | **£50,809 - £56,154** |
| **Job Summary:** | * To deliver on the vision of the Chester Diocesan Academies Trust to provide high quality and dynamic education for all at the heart of our communities by providing strategic leadership and professional management of all support roles and services. These will include Finance, ICT, Human Resources, Estates, Procurement and Contracting, Health & Safety, Safeguarding and Administration teams and contracted providers as well as working with Academy Business / Finance Managers. * Be a highly visible and credible leader within the central Senior Leadership Team and work to support the Trust Board, CEO and committee structure as the Trust continues to expand and grow, whilst designing and implementing the strategic vision with senior colleagues. * Act as Company Secretary providing essential advice on Company matters * To act as an ambassador for CDAT |
| **Accountable To:** | The Chief Executive Officer, Deputy Chief Executive Officer and the CDAT Board of Directors |
| **Responsible For:** | Finance and Central Services Team, Business staff in CDAT academies |
| **Key Relationships:** | CDAT Officers and staff.  Diocesan Board of Education Officers and Staff  CDAT academies  Service providers  ESFA  HMRC  The Charity Commission  Companies House |
| **Hours:** | Full Time |

**Main Duties**

* To take shared responsibility for the development and rapid improvement of schools in the Trust, or school(s) joining the Trust.
* To provide high quality leadership and management of CDAT’s finance and business functions to enable the Trust to run smoothly, efficiently and effectively in the delivery of the Trust’s core aims.

**Key areas of responsibility:**

**Strategic Leadership**

* Provide advice and guidance to the CEO/Deputy CEO/Trust Board on all aspects of CDAT’s non-academic operations
* Deputise for the Deputy CEO in all aspects of work that do not require an educational background
* Shape, implement and deliver the strategic plan as part of the Senior Leadership Team
* Line manage all CDAT Financial and Business Services’ managers and ensure effective communication and collaboration which enhances the value that the Trust brings to its academies
* Build and develop a culture of high performance, ensuring succession planning is in place at all levels
* Ensure support structures within CDAT reflect the best practice from business and from the emerging research into successful academy trusts
* Provide clear information, advice and recommendations to the CEO/Deputy CEO, academy SLTs, Board and Finance and General Purposes committee regarding the strategic development of support services in the use of assets and the development of CDAT’s activities to ensure the best possible learning environment for students.
* Lead the CDAT Finance function such that:-
  + Resources are directed to provide the most positive educational outcomes for students
  + The Board, CEO/Deputy CEO and academies are provided with accurate, timely and actionable financial and management information
  + Financial systems are managed effectively to expedite the CDAT budget cycle and to support decision making across the organisation
* Work with the CEO/Deputy CEO to prepare the annual and medium-term business plans, taking into account performance improvement objectives, funding projections, and other potential events and activities
* Take lead responsibility for policy development and implementation in all support areas
* Ensure CDAT is represented in national, regional and local networks so that the Trust influences and is alert to new trends and is familiar with current best practice in the developing education sector
* Establish a high level of credibility, visibility and professionalism and manage strong working relationships with internal (especially academies and Diocesan staff) and external partners
* Promote and safeguard the welfare of students
* Work closely with the CEO/Deputy CEO on developing a strategic plan that develops finance, HR, premises and other support teams to ensure a proactive approach to maximising the best use of resources

**General Finance**

* Maintaining a secure overview of the management of all financial issues within each of CDAT’s academy schools
* Keeping the CEO/Deputy CEO and the Board up to date with the latest Education and Skills Funding Agency (ESFA) changes and other statutory guidance and providing filtered briefings
* Ensuring the financial sustainability of the Trust
* Advising the CEO/Deputy CEO and the Board on all matters relating to the financial strategy, on the impact of their decisions on the financial position of CDAT and on strategic matters, within the framework for financial control determined by the Board
* Upholding good governance and ethical behaviour including good accounting practices in the finance function and ensure CDAT upholds good accounting, reporting and internal control systems
* Maintaining effective systems of internal audit control;
* Reviewing Trust policies, processes and procedures to ensure compliance with various external regulations including filing deadlines regarding VAT, PAYE, ESFA, DfE, HMRC, Charity Commission and Companies Acts
* Providing efficient financial assistance to the CEO/Deputy CEO, the Board and headteachers/principals regarding all aspects of financial management within the Trust
* Ensuring all forms and returns required by the ESFA and the CDAT Board are prepared and submitted in the formats specified by the ESFA/DfE and filed by the relevant filing deadline
* Assisting in writing the Annual Report and the preparation of the consolidated financial statements in the statutory format specified by the ESFA, Companies Acts and Charity Commission for auditing by the external auditors. Arranging a timeline and detailed checklist of work to be done in house and by the external auditors to ensure the audited statutory accounts are filed with the ESFA by 31st December
* Preparing the quarterly, monthly and ad-hoc management accounts
* Maintaining a strategic financial plan including a 5 year budget plan for CDAT
* Advising the CEO/Deputy CEO and the Board if fraudulent activities are suspected or uncovered
* Authorising and maintaining the Risk Register
* Liaising with external regulators such as the ESFA/DfE, Charity Commission, Companies House, external auditors and internal auditors as required
* Developing checklists for month-end reports to ensure that reports are prepared on a reliable and consistent basis
* Developing and maintaining the in-house Financial Policy and Procedures Manual that sets out CDAT’s operational procedures combining best practice with the latest Accounts Direction issued by the ESFA
* Assisting the headteachers/principals in setting and managing their school’s budgets together with setting The Trust’s budget, thereby enabling CDAT’s schools to deliver the curriculum in a cost-effective manner
* Providing support and guidance to any staff in individual schools with financial responsibility
* Cooperating with, initiating and managing audit procedures
* Liaising with the company accountants and CDAT’s local audit officers and internal auditors
* Attending relevant committee meetings (Finance and General Purposes, LGB, Board) as required to maintain the presence of the finance function and ensure broader financial aspects of key decisions are fully considered and communicated
* Supporting or leading financial and operational risk assessments and assistance with implementation of appropriate safeguards
* Receiving, analysing and interpreting financial reports, communicating findings in a simplified manner when necessary
* Researching, leading and advising the CEO/Deputy CEO and headteachers/principals on additional funding, revenue/income opportunities and additional business opportunities
* Preparing appropriate bids or tender documents to acquire identified additional funds or grants (responsibilities are developed collectively)
* Executing the generic duties of a senior leader
* Performing other ad hoc duties and assignments as may be determined by the CEO/Deputy CEO and the Board

**Budgets, internal audit and purchasing**

* Monitoring the preparations in school of an annual draft budget plan for each academy school for consideration by the Finance and General Purposes Committee and the Board of Directors before the start of each relevant financial year
* Monitoring expenditure and reporting to the CEO/Deputy CEO regarding income and cash flow against the approved budget and submitting reports on the Trust and academies’ financial position to the Finance and General Purposes Committee
* Approving virements within the delegated financial limits for CDAT core operations and reporting such approvals to the Finance and General Purposes Committee
* Reviewing any virements required for any academy school’s budgets and recommending these to the CEO and Board for approval if required by delegated powers
* Ensuring compliance with PAYE, NI, VAT and other relevant legislation
* Maintaining and resourcing an effective internal audit function or equivalent
* Producing internal termly audit reports, together with any recommendations for improvement
* Ensuring internal reports are shared with the CEO/Deputy CEO, headteacher/Principal and Finance and General Purposes Committee
* Maintaining an overview of all CDAT’s academy schools and providing best value options for key purchases
* Overseeing tenders for service contracts and cost effectiveness
* Providing guidance to staff with financial responsibilities and the CEO/Deputy CEO over retention of quotes obtained for goods, works and services and other associated documentation such as minutes of meetings, recording of decisions and reports

**Human Resources**

* Through liaison with CDAT’s HR provider manage the administration of personnel matters for staff, including appointments, contracts of employment, conditions of service, insurances, legal and other advisors, discipline and grievance matters, and making recommendations to the CEO/Deputy CEO and Board as appropriate
* Through liaison with CDAT’s HR provider develop, maintain and implement Human Resource Management policies and procedures
* Through liaison with CDAT’s HR provider ensure compliance with all relevant employment law
* Liaise, consult and negotiate with union and staff representatives as and when the need arises
* Develop a core Trust HR Service and look to develop a pay roll service for academies in the Trust

**ICT, Data Services and Estate Management**

* Maintain and deliver a rolling ICT strategy which aligns with the educational and development plans
* Ensure the development and maintenance of appropriate ICT infrastructure and systems to support the objectives and aims of CDAT
* Develop the asset management plan and site master plans, ensuring that accurate data are maintained and that projects and priorities support the educational plans and requirements
* Develop and implement strategies for premises management to ensure that the quality of the estate and the learning environment for students is improved, sustainable and maintained
* Develop and deliver long-term maintenance plans and effective reactive maintenance services
* Develop and deliver building improvement projects, liaising with architects and drawing up proposals as required
* Ensure effective tendering and management of contracts for work done by external contractors
* Ensure the effective implementation of Health and Safety requirements across the Trust and compliance with Health and Safety law
* Ensure that Data protection requirements are fully compliant at both central and individual academy level
* Provide appropriate and up to date policy and guidance to individual academies regarding data protection and monitor its implementation

**Procurement, Project and Contract Management Role**

* Ensure best value in the acquisition of supplies and services through effective procurement and tendering
* Provide project management expertise and advice to the CEO/Deputy CEO
* Monitor the operation of policies concerning procurement and ordering
* Monitor the operation of contracts entered into for the supply of goods and services
* Ensure all contracting and procurement activities are fully compliant with all public sector legislation and regulatory requirements
* Identify opportunities for new build schools and create an effective template for preparing bids
* Ensure CDAT uses appropriate funding mechanisms to enable value for money on capital projects
* Oversee all significant capital building projects and liaise with headteachers/principals, governors, consultants, contractors and other interested parties as necessary
* Develop new services to offer to CDAT academies
* Investigate, source and maximise income (revenue and capital), liaising with funding agencies and government, amongst others, and liaise with the academy Building consultant in writing bids
* Ensure that any funds received from successful bids are spent appropriately, within budget and timescales

**Administrative Services**

* Ensure the development and maintenance of appropriate administration systems to support the objectives and aims of CDAT
* Maintain a disaster recovery strategy for CDAT, with detailed operational plans
* Maintain systems in order to provide statistical and information returns for outside agencies
* Maintain and ensure regular review of CDAT’s data protection, personnel, safeguarding, fire safety and health and safety policies, and ensure that all required procedures, including Equalities Act requirements are in place

**General**

* Representing and promoting the Trust’s Christian values internally and externally
* Delivering day-to-day duties consistently with the agreed service level
* Acting as a champion for change and improvement, constantly enhancing quality
* Actively promoting and acting, at all times, in accordance with Trust’s policies, e.g. Health and Safety, Equal Opportunities and Safeguarding
* Making a commitment and contribution to improving standards for pupils, as appropriate
* Contributing to the maintenance of a caring and stimulating environment for pupils
* Undertaking other duties commensurate with the job level
* Interact professionally with colleagues to ensure understanding and awareness of responsibilities of all colleagues and undergo any relevant training.

**Note**

**General**

The postholder will comply with the general terms and conditions of service and undertake such other duties appropriate to the salary and content of the work as may reasonably be required. Therefore, the list of duties in this job profile should not be regarded as exclusive or exhaustive.

**Data Protection**

The post holder is responsible for ensuring that workplace responsibilities are carried out in compliance with the requirements of the Data Protection Act and the Employment Practices Data Protection Code, especially concerning confidentiality, treatment of personal information and records management.

**Health, Safety and Wellbeing**

With reference to all relevant advice and guidance, ensure each Academy complies with Health and Safety legislation and manage the security, upkeep and improvement its buildings to ensure an effective and safe environment that promotes the welfare of children and staff.

**Equality and Inclusion**

Chester Diocesan Academies Trust is committed to safeguarding and promoting the welfare of children, young people and vulnerable adults and expects all staff and volunteers to share this commitment. The successful applicant will require an Enhanced DBS check. We welcome all applications regardless of age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion and belief, sex, sexual orientation.

The post holder will take responsibility for behaving in ways that are consistent with fair and equitable treatment for all and take responsibility for their own learning and engagement with equality issues and actions and to consider the impact of their actions to ensure that they do not have a detrimental effect on achieving equality of opportunity. Any breaches may lead to termination of employment.

**Person Specification – Chief Operating Officer**

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| **Qualifications** | **Essential/**  **Desirable** |
| Qualified to degree level | D |
| Professional finance or finance related qualification at graduate level (i.e ACA, ACCA, CIMA, CIPFA, MAAT, DSBM or equivalent) | E |

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| **Knowledge, understanding and experience** | **Essential/**  **Desirable** |
| Significant post qualifying experience and in depth professional knowledge acquired through experience | E |
| Experience of managing significant financial resources with a good appreciation of relevant regulatory frameworks | E |
| Familiarity of financial processes and procedures | E |
| Experience of effectively managing a team | E |
| In depth knowledge of statutory requirements, procedures and regulatory requirements relating to academies | D |
| High level of IT competence, literacy and numeracy skills | E |
| Experience of using and supporting others in the use of financial software packages, including a working knowledge of HCSS | D |

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| **Personal and professional qualities** | **Essential/**  **Desirable** |
| Strong persuasive, influencing and interpersonal skills with the ability to communicate clearly and confidently | E |
| Excellent skills in strategic planning and strategic management of financial resources | E |
| Clear analytical skills to allow the exploration, evaluation and interpretation of information and opinions and utilisation of management information systems | E |
| Strong decision making skills with the ability to make decisions and recommendations based on the analysis of options | E |
| Capacity to work under pressure, to meet deadlines and organisational priorities | E |
| Good leadership skills and ability to inspire and challenge colleagues | E |
| Commitment to staff’s and won personal development | E |
| Flexible in terms of working patterns and evolution of the role | E |
| Team player, personable, emotionally intelligent with a sense of humour | D |

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| **Special requirements** | **Essential/**  **Desirable** |
| Supportive of the principles of the academies programme | E |
| Be sympathetic to the aims, values, ethos and distinctiveness of Church of England schools and academies | E |
| Able to travel across the Diocese and beyond to carry out duties | E |

**Right to Work**

Existing British and European Law states that a person cannot be employed to this post if they do not have permission to live and work in the UK. Please advise if you require any guidance or further information on this.

**Disclosure Service Certification from the Disclosure and Barring Service**

New members of staff will be required to apply for Disclosure Service certification as part of the School’s staff recruitment process. Further information about the Disclosure and Barring Service is available from the DBS website at: www.homeoffice.gov.uk/

Under the Rehabilitation of Offenders Act 1974 (Exceptions) Order 1075, applicants for this post are among those who are not entitled to withhold information about any previous criminal conviction.

**Application Procedure**

Candidates should complete the application form and submit it electronically to [charlotte.somers@chester.anglican.org](mailto:charlotte.somers@chester.anglican.org) so that it is received no later than 20th October at 5pm

**Application Form Completion**

Please focus the reasons for your application on the essential criteria within the Person Specification. Indicate, providing evidence, how your knowledge, skills, experience and personal attributes either at work, or elsewhere, qualify you to undertake the duties and responsibilities set out in the Main and Specific Duties.

All gaps in employment must be accounted for.

**Selection Procedure**

The shortlist will be drawn up soon after the closing date. The **interview process** will be confirmed.