

MAT Finance Manager

Recruitment Pack

**Start Date: immediately**

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 Finance Manager working as part of our central team and within our academies. The Chester Diocesan Academies Trust (CDAT) is seeking an inspirational and innovative Finance Manager who will take full advantage of this chance to be part of a growing trust.

You will need to have current membership of a professional body (AAT or above) and have appropriate professional qualifications, experience of management of large budgets and ideally an understanding of the school finance system. The successful candidate will have a track record of building a motivated team and relationship management with stakeholders. The role of Finance Manager 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 other personnel the successful candidate will continue to develop all the relevant financial 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 Finance Manager 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 and in particular Academies. The following information pack provides details specific to the Finance Manager 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 Neil Dixon (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.

Within this family, a group of DBE schools (currently six) 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.

**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:**  | **Finance Manager**  |
| **Salary:** | **£32,878 - £37,849 (NJC Pt 30-35)**  |
| **Pension:** | **Membership of Local Government Pension Fund**  |
| **Job Summary:**  | The MAT Finance Manager is responsible for the financial management and statutory reporting requirements of CDAT* This will include:
* Maintaining the financial accounting systems across the MAT ensuring compliance with the Academies Financial Handbook and other key financial guidance and legislative requirements
* Monitoring and implementation of appropriate financial policies and procedures across the MAT
* Responsible for financial management and reporting at school and central level and consolidation of management accounts and statutory reporting for the MAT
* Supporting the transition process of converting schools
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| **Accountable To:**  | The Chief Executive Officer, and the CDAT Board of Directors  |
| **Responsible For:**  | CDAT Administrator, finance staff in CDAT academies  |
| **Key Relationships:**  | CDAT Officers and staff.CDAT principals and Academy Business ManagersDiocesan Board of Education Officers and StaffCDAT academiesService providersESFADfEHMRCThe Charity Commission |
| **Hours:** | Full Time – 37 hours per week |

**Job Context and Expectations of the Postholder**

* This is a high profile post within an existing Multi Academy Trust
* The environment is sometimes pressurised so flexibility, a calm approach and a “can-do” attitude are required to carry out the role effectively
* The postholder’s integrity and discretion must be without question in order that CDAT finances are managed to the highest standard
* Positive interactions with staff and pupils are an expectation
* Direct supervision is minimal so the ability to prioritise, use initiative, be proactive, organise one’s own workload and that of others, whilst maintaining high standards. Is essential
* The postholder must be proactive in keeping professional knowledge up to date and have a commitment to personal and professional development
* It is crucial that all staff in CDAT adhere to and actively support MAT policies
* To take shared responsibility for the development and rapid improvement of schools in the Trust, or schools joining the Trust.
* To be the first point of contact for schools on all finance matters alongside the Trust Finance Director.
* Be an active member of the CDAT Finance team taking responsibility for the implementation of systems, training and reporting across the MAT.
* Provide sound financial knowledge to the School Business Managers on all aspects of finance, ensuring that their CPD and mentoring is being supported across all levels.

**Core Purpose**

To lead on the provision of a forward thinking, responsive and professional Finance service, while ensuring the Multi-Academy Trust (MAT) remains compliant with the requirements of the Academies Financial Handbook, Companies House, the Charities Commission and other relevant statutory and regulatory requirements.

**Core Expectations**

Staff should recognise that as the Trust grows job roles will inevitably develop and change focus, and job descriptions will be reviewed accordingly. Staff need therefore to be flexible in their approach to accommodate the changing needs of the MAT and to participate fully in professional development to support this.

**Key Accountabilities**

1 Responsible for ensuring that the Trust’s accounting systems are effectively and accurately maintained in compliance with the Funding Agreement, SORP, the Academies Financial Handbook, the Academies Accounts Direction and all relevant Companies and Charities legislation

* Responsible for developing and monitoring the Trust’s financial procedures and processes
* Undertake the finance system administration tasks e.g. creating new periods and year end processes
* Undertake period end procedures for all academies and central function in a timely and efficient manner
* Identify and perform all necessary accounting adjustments for all schools and the MAT central function
* Responsible for financial monitoring and reporting across the MAT
* Submit a VAT claim each month from information provided by the School Business Managers, ensuring that the information is accurate and correct. This will require reviewing each academy and listing and generating a single claim form in the required format for submission to HMRC.
* Ensure that VAT due to the MAT is received from HMRC, and on receipt that each academy is paid the balance due to it.

2 Responsible for ensuring that financial data produced is fir for purpose to support the Trust’s financial reporting and strategic decision making

* Monitor and report local financial information to support the consolidation for MAT financial reporting and strategic decision making
* Cover the finance functions in schools when necessary
* Provide support for any capacity or capability issues identified in schools

3 Responsible for the production of information to support scrutiny, analysis, Audit and Statutory Financial Statements

* Support the CEO to ensure that the schools financial policies, procedures and structures meet each school’s needs and maintain compliance with Financial Standards
* Quality assure financial processes and procedures and report to the CEO on a monthly basis
* Ensure that all financial data recording has a clear audit trail and meets audit criteria to adequately evidence the content in the financial statements
* Responsible for the timely submission of all statutory returns
* Ensure resources are directed to provide the most positive educational outcomes for students
* Ensure financial systems are managed effectively to expedite the CDAT budget cycle and to support decision making across the organisation

4. Responsible for the production of deliverable financial plans which support each school’s curriculum and investment strategy

* Manage the production of the annual budgets across the MAT
* Ensure all income and expenditure is accounted for and provide regular assurance to the CEO and CDAT Board
* Proactively report budget variances and recommend key management actions
* Identify investment opportunities and make recommendations
* Work closely with the 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

5. Responsible for monitoring and reporting local financial information which support the consolidation of the MAT financial reporting and strategic decision making

* Produce consolidated management reports on a monthly basis for the Trust
* Monitor monthly outturns for the schools and MAT
* Ensure that the School Business Managers are supported to meet the demands of their role so that they can play their key role in the academy and the MAT, including month end close, journal adjustments control account reconciliation and outturn preparation
* Work with the CEO to prepare the annual and medium-term business plans, considering performance improvement objectives, funding projections, and other potential events and activities
* Advising the 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
* 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
* Advising the CEO and the Board if fraudulent activities are suspected or uncovered
* Authorising and maintaining the Risk Register

6. To Support the achievement of value for money across the MAT

Ensure best value through:

* Local purchasing, contract monitoring and benchmarking
* Contribute to the preparation of local bids and tenders for capital projects, grants and services

7. To keep professional knowledge up to date

* Attend briefings on financial matters and feedback to the CEO and CDAT Board
* 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

**8** Representing and promoting the Trust’s Christian values internally and externally by

* 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.
* Building close working relationships with Head Teachers, Chairs of Governors and the CDAT Strategic Team.

**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 – MAT Finance Manager**

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| Qualifications/Background | **Essential/****Desirable**  |
| Recognised qualification in accounting e.g. Part qualified CCAB Accountant or fully qualified AST accounting technician or comparable financial experience  | E  |
| proven experience of financial management and reporting in a Multi Academy Trust and/or a secondary/primary school academy | E |
| Qualification in School Business Management e.g. CSBM/DSBM or equivalent  | D |

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| **Knowledge, understanding and management experience**  | **Essential/****Desirable** |
| Business/delivery issues and the appropriate knowledge to handle and resolve complex issues, anticipate problems and recommend solutions within an overall strategic plan – preferably within the sector | E  |
| Experience managing significant financial resources with a good appreciation of relevant regulatory frameworks  | E  |
| Familiarity of financial processes and procedures  | E |
| Experience of effectively managing staff team s including their professional development and performance management | D |
| 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 | E |
| Good organisation and proven administrative skills | E |
| Experience of initiating, planning and delivering successful change | E |
| Experience managing/tailoring financial procedures and policies | E |
| 5 years experience of financial reporting, preferably at least 2 years in an Academy environment | E |
| At least 1 years experience of supporting consolidated budgeting and reporting preferably in an academy | E |
| Commercial awareness and ability to achieve value for money | E |
| Experience of advanced Excel skill including the use of pivot tables and macros. | D |
| Knowledge and understanding of procurement processes | D |
| Experience in revenue generation | D |
| Knowledge of the Academy Conversion process | D |
| Knowledge of charities and Companies House legislation | D |
| Knowledge of submitting VAT claims | 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 with different management levels within the organisation  | 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 own 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 |
| Ability to analyse school performance data and finances accurately and identify next steps for progress | E |

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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 alex.harris@cdat.co.uk, so that it is received no later than Wednesday 12th June 2019.

**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.