

discoverytrust.org



# Recruitment Brochure

Chief Finance and Operating Officer | May 2023



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“

I joined Discovery in October last year, the team and Trustees have been supportive, helpful and friendly. My ideas have been taken on board and it's really enjoyable working for such an innovative Multi academy Trust, where children are at the heart of all we do.

Marie Bannatyne  
Head of Governance



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# Welcome from the CEO

## Thank you for your interest in the hugely important post of Chief Finance and Operating Officer (CFOO) for Discovery Schools Multi Academy Trust.

**We hope that the information contained within this pack provides you with sufficient insight and information to decide if you have the right qualities, skills, and experience to join our journey.**

The Discovery Schools Academy Trust is an educational charity established in July 2012 and consists of 15 schools; 13 of these are primary schools, 2 are SEMH special schools and we have 2 new primary schools due to open in the next few years. Our schools currently serve the communities of Leicestershire, Leicester City and Rutland but we are due to expand to adjacent counties, including Cambridgeshire, and potentially Lincolnshire in the near future.

Our Trust vision is to provide Limitless Learning opportunities for colleagues and children to ensure everyone has the opportunity to reach their potential. Our schools work in close collaboration in order to share experience through co-constructed systems and processes and challenge each other to reach our full potential. Our vision is

underpinned by the highest expectations on what every child can achieve regardless of their context or starting point.

Our Trust is poised on the edge of expanding into new areas and opportunities. We are an innovative Trust that has embraced digital transformation to ensure our most disadvantaged learners are on a level playing field and working collaboratively. We can leverage efficiencies and information to ensure we are proactive in our wider development. Discovery Trust prides itself on how we serve our communities and the education system. Therefore, in joining our Trust team, you will influence the education system both locally and nationally with the work that you do. We have our specialist support services such as Educational Psychology, Speech and Language Team, a Teacher Training Organisation, and a highly effective Central Support Service team. The Discovery Central Support Service team are a group of highly skilled, talented, and motivated individuals, who thrive to ensure that they work efficiently to provide a structure





of support and a framework for innovation. We believe deeply in developing our colleagues to reach their full potential and achieve excellence in all they do. At Discovery, we pride ourselves on the opportunities and support we give to colleagues. Our Headteachers and Senior Leaders work together, in often challenges situations to ensure we are maximising the opportunities for our children and gaining best values in all that we do.

The CFOO is a new role for the organisation and will replace a Director of Finance who is leaving in the summer. This colleague has been instrumental in the success of the Trust to date and in the current climate, Discovery is in a really good position financially and well placed strategically, for her successor. This post will suit someone who wants to make a difference, enjoys a challenge, lead change and thrive in an innovative environment.

I am immensely proud of Discovery; I am incredibly lucky to work with motivated and driven individuals who challenge us to be the

best we can be every day. I work with a team, where integrity and inclusion are built in the very DNA of what we do. We are supported by a highly effective and supportive board who empower us to enrich children's lives.

If you would like to find out more about the Trust, please do not hesitate to contact me.

**I look forward to meeting you.**



*Paul Stone*

**Paul Stone**  
CEO

# Discovery Schools Academies Trust

## About Us

Discovery Trust is a well-established and respected partnership of 13 primary schools and 2 SEMH special schools. The Trust provides support and resources needed to ensure that all schools can achieve, and colleagues across the Trust can thrive in their roles.

Regardless of our role within Discovery, we are working for something bigger. Everything we do is to ensure that our children and our colleagues realise their potential and experience limitless learning opportunities. We aspire to achieve **excellence** in all areas of our work. The children and families we work with have confidence in the teachers and leaders of the Trust who act with **integrity** and demonstrate **respect** for individual needs. Discovery aspires for all our schools to become **sustainable** and **inclusive**, driven by a passion for working in **partnership** with all stakeholders.



## Working Together

Our school's range in type, size, and location. We pride ourselves in providing the absolute best education possible for children. Our schools work closely together, regularly meeting as a cluster and as a group of Headteachers, sharing best practices through networking and collaboration. We have established regular briefing meetings for our headteachers, SEND operation meetings and a face-to-face network for office managers. Our central service team meets once a term for Trust Away Days, all our service leaders meet half-termly to review progress and challenges arising. The Trust Executive Team, which the CFOO will be a member of meets weekly to support the development and improvement of the Trust. We also coordinate Strategic department meetings that include a headteacher and wider stakeholder representation.

We operate a hybrid model of working, which includes working onsite from the head office, based in Beaumont Leys, team working days, school visits and remote working. We use Microsoft Teams as our core communication tool.

Our Central Leaders attend an annual leadership conference together and are heavily involved in the Trust Awards for both colleagues and children.

## Trust Development

**Over the next few years, we expect significant growth across all school sectors. Coming in the next two years, two brand new schools: one located in Kibworth, “Cibbaeus” Primary School, a national free school bid and another in Cambridge City called “Darwin Green Primary School” the latter being a local authority presumption bid. We aspire to expand into secondary education and are actively seeking partners to join our Trust as well as expanding our SEND provision. This presents us with numerous challenges, but a wealth of exciting opportunities for the Trust to grow and increase the opportunities for all our children. This new role will be central to our growth and project management and will bring exciting opportunities to really make a difference.**

The Trust seeks growth to develop its central capacity and achieve economies of scale to allow schools to focus on their core task of teaching and learning.

Our scope will be widening beyond our current geographical area to include counties such as Cambridgeshire, Lincolnshire, and Northamptonshire.

We work with schools that are committed to providing an excellent education for all children and strive to develop ambitious

individuals at all levels, regardless of background. All schools retain their autonomy for decision-making but within agreed framework's routed in recognised research.



**All teams are very welcoming and supportive, working towards the same common goal. I would say throughout my whole career, Discovery has been the best to work for, and the people make it a great place to work.**

Dawn Huntley  
Assistant Finance Director

# The Role...

Considering the needs and growth of Discovery, we have decided to invest in a CFOO role to effectively lead and inspire our central services function to ensure we have the capacity and expertise to meet the challenges of future growth and improvement, without compromising the support we offer our schools and leaders. The CFOO will hold a significant position in the Executive Leadership team, providing strategic advice and leading whole trust change projects.

## The Person...

Discovery Trust is seeking a CFOO who is an enabler: a person who will support the Trust's development in a time of unprecedented challenge. We are seeking someone with creativity and rigour, someone who will be morally driven and have incredible attention to detail that will ensure we succeed in avoiding and/or predicting future pitfalls. The successful person will need significant senior financial management and strategic leadership experience either in the public or private sector and who has previously had accountability for a wide and complex resource base.

Alongside exceptional technical ability, you will be a strategic thinker that can demonstrate their ability to build and empower agile teams that will fuel our collaborative culture, and engage with all stakeholders across the Trust. The CFOO will need diplomacy, openness, be approachable, be an authentic leader, a personable style of leadership and resource management, as well as have the ability to converse with internal and external stakeholders with integrity.

## The Legend that will be...

This position requires superhuman skills, an amazing sense of humour and a calm personality. Being a CFOO is one of the toughest jobs currently, constantly pulling rabbits out of hats, giving over-enthusiastic leaders sobering messages whilst keeping a positive outlook on the bleak future of public service funding. A CFOO will require crystal ball gazing skills and a nose for detective work when embroiled in the education funding landscape

A Legend needs an amazing team: I feel Discovery is this team, a team that are ready to 'Assemble' and be ready to meet the challenges we will face ahead.





## Our Focus for 2022-23

- Create an intelligent accountability framework that uses Trust QA processes for early identification of support & challenge.
- Create a Trust Tutoring and Disadvantaged Catch-up strategy that ensures access to high-quality learning support and provides specialist learning opportunities.
- Develop the use of compliance software platforms to support leaders with high-quality data for decision-making.
- Develop wider professional Trust links for the growth and development of the Trust.
- Improve the Trust school's efficiency of energy use and stakeholder awareness of their role within this process.

## What we offer

- Flexible working options.
- Support for continuous professional development in the role.
- Opportunities to visit other organisations for professional learning.
- A Professional network of other CFOs & COOs doing a similar role.
- Highly committed and motivated Team
- A role which has the opportunity to make a real difference whilst having fun.
- Free Car Parking
- Annual incremental pay increases within the pay scale range.
- A defined benefit pension scheme.
- Employee assistance programme (welfare).
- Eyecare Vouchers Scheme.
- Employee Self Service Portal.

# Job Description

**Job Title:** Chief Finance and Operating Officer (CFOO) Job Description

**Grade:** 18, starting salary £93,843. **Post Number:** DST047BC **Responsible To:** CEO (Trust Leader)

**Responsible For:** Director of Operations, Director of IT, Head of Governance, Extended Services Manager, Assistant Finance Directors

**Key Relationships/ Liaison with:** Central Service Teams and school leaders

**Workplace:** Hybrid Working - expectation to travel across multiple locations

## Key Purpose:

**The prime directive of the Chief Finance and Operating Officer (CFOO) is to facilitate the best possible educational provision and outcomes by successfully removing any non-academic barriers to achieving Trust and school academic goals and maximising the capacity of Headteachers and their staff by ensuring they are fully supported in their work.**

The CFOO will oversee all areas of the Central Service Team, deputising in the absence of the CEO and line manage Central Service area leads, ensuring that: the support services functions are well managed on a day-to-day basis; systems and processes are rigorous, robust and fit for purpose; staff work as one team towards a common purpose and are effectively and efficiently deployed, and perform to the highest standards

The CFOO is integral to the delivery of the Trust's strategic aims and will play a key role as a member of the

Trust Leadership Team, providing Board assurance, dynamic leadership, strong management and clear direction across all non-academic services for the Trust, championing continuous improvement principles and engendering a 'can do' culture.

Incorporating the Chief Financial Officer role, the CFOO will take responsibility for ensuring financial sustainability, development and compliance of statutory and legal requirements.

Leading on the Discovery Trust's business plan, the CFOO will ensure that the Trust Business Model is scalable and effectively supports the internal and external growth of the Trust, leveraging economies of scale to enable even greater investment in children's education.

The CFOO will be responsible for the provision and strategic analysis of timely, accurate and valid performance information to the Chief Executive, the







Leadership Team, Headteachers, the Board and, where necessary, external parties.

The CFOO role will be critical in realising the growth potential of the Trust by developing and leading on highly effectively support services through an Organisational Development Strategy (ODS) aligned to the current and future needs of the Trust, and by ensuring that activities and resources are coordinated and managed in an effective, efficient and productive way, to support the delivery of high-quality education to current and future pupils.

The CFOO will support the CEO in delivering on Discovery's Education Trust's growth strategy, leading any future bids, due diligence processes, capital and other projects.

This is a new post and is partly developmental in nature. Therefore, what follows in terms of duties and responsibilities should be read as

indicative. There will be scope for the role to change as the Trusts develops and there's more clarity about specific, details, which may be phased over time according to the Trust's changing needs.





## Main Duties And Responsibilities

### Leadership of Trust Central Team Support Services

- Deputise for the CEO in any aspect of work that does not require an educational background (If required).
- Represent the Trust Central Team at Executive Leadership level, the Board of Directors and external bodies where appropriate. As a member of the Executive Leadership Team, represent the Trust in planning and development and ensure clear and effective two-way communication between school colleagues and the Trust Central Team.
- Devise and implement the strategy for the Trust Central Team, including colleague structures, administrative functions, processes, procedures, and performance measures.
- Provide leadership to managers and teams within the Central Team functions to ensure they are resourced and equipped to meet the Trust's changing needs. Ensure all team members have challenging appraisal objectives and are engaged in professional learning, which promote high expectations, and which are aligned with the Trust's values, vision, mission and wider strategic plan.
- Deliver effective change management.
- Drive efficiencies across the Trust. Ensure income generation opportunities are identified and maximised and colleagues appropriately supported in securing relevant grant funding.
- Ensure the Trust complies with all legal and statutory requirements including GDPR and the Freedom of Information Act.

### Service Delivery

- To keep administrative processes and Trust Central Team structures and requirements under review, and to make recommendations for improving their effectiveness and efficiency, by analysing current and future needs and making recommendations to executive and governance leadership for changes in structures and functions.
- To recommend to the CEO and Board the appointment/reappointment of appropriate professional advisers and contractors ensuring the Trust complies with best practice in all aspects of project planning, consultation, procurement, commissioning and delivery.
- Lead on risk management and mitigation, strengthening control, ensuring that the Chief Executive, headteachers and Trustees are appraised of risks and issues and that these are being mitigated and managed appropriately. Arranging and coordinating drill down/internal audits on behalf of Audit and Risk Committees.
- Proactively review business, operational, and financial systems and processes. Analyse and resolve complex issues and provide alternative solutions and process improvement plans as needed. Interrogating data and challenging quality and accuracy of data received from all departmental leads.
- Lead the development and maintenance of all MAT policies and procedures within the post holder's areas of responsibility, ensuring not only compliance with all relevant statutory requirements but that they are entirely fit for purpose, communicated to all relevant stakeholders and that training and development are provided to warrant understanding.
- Carry out financial due diligence and work with Director of Operations on all conversions for schools joining the Trust.



## Finance

- Maintain the Trusts accounts in accordance with the funding agreement and Academies Financial Handbook issued by the funding body and in accordance with the financial regulations and procedures of the organisation. The CFOO will ensure that the Trust follows best practice in terms of financial governance, and ensure the probity, and legislative compliance, of all financial transactions, including payroll and cash handling, and the integrity and suitability of all control mechanisms (audit and risk management).
- To ensure robust treasury management processes are in place to maximise return of cash and investments and ensure the trust has sufficient cash to deliver its objectives.
- Provide strategic leadership, direction and management in Finance, ensuring high standards and the development of systems appropriate to the Trust. Develop a 3 year financial plan, taking into account DfE and relevant Government guidelines, and other sources of information about budget trends and local pupil demographics.
- To devise and lead a budget process which enables Headteachers to prepare school budgets in line with School Development Plans.
- Lead on the development and operation of Finance Policies and Procedures.
- Optimise the benefit to the Trust and academies of funding from grants and other sources, ensuring that funding is appropriately used and compliant with DfE statutory guidelines:
  - Investigate, source and maximise income (revenue and capital), liaising with funding agencies and government, amongst others, and write associated bids
  - Ensure that any funds received from successful bids are spent appropriately, within budget and timescales,
  - Identify opportunities for free school, new build schools and create an effective template for preparing bids.
  - Ensure the Trust uses appropriate funding mechanisms to enable value for money on capital projects.
- Ensure that annual accounts are externally audited, presented and adequately supported by the underlying records of each school; including the maintenance of effective systems of internal control.
- Ensure follow up on recommendations of Internal and External Audits.
- Ensure returns to the ESFA and other funding agencies are completed correctly and on time; and returns to statutory agencies are also completed and returned on time, including tax obligations.
- Ensure the Trust has the correct insurance cover for all areas of the business.

## Procurement & Contract Management

- Ensure formal contracts are in place for all infrastructure projects, including robust project management arrangements, and with project requirements and scope agreed, aligned to available funding, and with appropriate contingency in place before work commences.
- Ensure all contracting and procurement activities are fully compliant with all public sector legislation and regulatory requirements.
- To ensure that 'Best Value' principles are applied to all appropriate purchasing decisions.
- Managing the Trust's procurement activities and ensuring they remained aligned with Trust's vision and values. Key activities will include; procurement strategy development, leading negotiations with suppliers, contract and supplier management, contract development, competitive tendering, market research and benchmarking.
- The identification and prioritisation of opportunities for savings on all non-pay expenditure, including aggregating demand across all of the Trust's academies.
- Lead the development, compilation and implementation of procurement systems and policies with the aim of providing robust controls to maximise value whilst minimising unnecessary bureaucracy.
- Ensure all procurement process are compliant with all relevant legislation and policies.
- Manage key and material contracts across the trust and provide oversight and guidance to ensure delegated contracts are managed effectively.
- Provide guidance and support to colleagues who undertake delegated procurement activities to ensure compliance, control and value for money.
- Act as professional advisor to Executive Leadership of the Trust on all procurement matters.

## Central Services Delivery Areas

- **Provide strategic leadership, for the delivery and effectiveness of the IT service, ensuring high standards and the development of systems appropriate to the Trust.**
  - Ensure the Director of IT creates a Trust Strategic Plan and a 3-year improvement plan.
- **Provide strategic leadership, for the service delivery and effectiveness of the Trust's Extended Service provision, ensuring high standards and the development of systems appropriate to the Trust.**
  - Ensure the Extended Services Manager creates a Trust Strategic Plan and a 3-year improvement plan.
- **Provide strategic leadership support and accountability, for the Director of Operations for the effectiveness of Estates, Operations and HR service.**
  - Ensure high standards and the development of systems appropriate to the Trust in conjunction with the Director of Operations.
- **Ensure the Director of Operation creates a Operations Strategy within includes a Trust People and Estates Strategy and a 3 year improvement plan.**
  - Work closely with the Director operations to large scale change projects in Estates and HR.
- **Provide strategic leadership and accountability for the Head of Governance, for the service delivery and company secretary role.**
  - Ensure the Trust has a clear and engaging scheme of delegation that includes high standards expectations and the development of systems appropriate to the Trust.
  - Ensure the Head of Governance creates a Trust Strategy and a 3- year improvement plan.



School & Organisation Department Liaison	General
<ul style="list-style-type: none"> <li>Develop and maintain strong networks between the School and Central Team staff to ensure that all professional support services contribute to academy planning and support the Trust's current, future and emerging needs..</li> <li>Work with the Chief Executive and Headteachers to identify and agree resources to support school requirements.</li> <li>Where practicable and appropriate ensure structures and processes are streamlined and designed to minimise time input from Headteachers and other members of the SLT.</li> <li>Ensure exemplary customer service and pupil satisfaction throughout Trust activities..</li> </ul>	<ul style="list-style-type: none"> <li>Carry out your duties with full regard to the Trust's Equality Policy</li> <li>Comply with Health and Safety policies, organisational statements and procedures, report any incidents/accidents/hazards and take a pro-active approach to health and safety matters in order to protect both yourself and others.</li> <li>Have a detailed understanding of, comply with and promote Trust corporate policies and procedures.</li> <li>Commitment to professional development of self and others.</li> <li>Undertake such other duties as are commensurate with the post and which may reasonably be required by the Trust's Board.</li> </ul>

## Special Factors:

Subject to the duration of the need, the special conditions given below apply :

- The nature of the work may involve the post holder carrying out work outside of normal working hours.
- The postholder may be required to attend, from time to time, training courses, conferences, seminars or other meetings as required by his/her own training needs and the needs of the school.
- Expenses will be paid in accordance with the Local Conditions of Service.
- This post is eligible for a DBS check under the Rehabilitation of Offenders Act 1974 (Exceptions) Order 1975 (i.e. it involves certain activities in relation to children and/or adults) and defined as regulated activity under Part 1 of the Safeguarding Vulnerable Groups Act 2006 before the coming into force of section 64 of the

Protection of Freedoms Act 2012 on 10th September 2012. Therefore a **DBS enhanced check** is an essential requirement.

This job description sets out the duties and responsibilities of the post at the time when it was drawn up. Such duties and responsibilities may vary from time to time without changing the general character of the duties or the level of responsibility entailed. Such variations are a common occurrence and cannot themselves justify a reconsideration of the grading of the post.

Discovery is seeking to promote the employment of disabled people and will make any adjustments considered reasonable to the above duties under the terms of the Equality Act 2010 to accommodate a suitable disabled candidate.

# Person Specification



**Job Title:** Chief Finance and Operating Officer Person Spec **Grade:** 18  
**Post Number:** DST047BC

**App** = Application Form

**Test** = Test

**Int** = Interview

**Pre** = Presentation

**Med** = Medical Questionnaire

**Doc** = Documentary Evidence (E.g., Certificates)

	Essential	Desirable	How assessed
<b>Qualifications</b>			
Fully qualified accountant (ACA /CIMA / ACCA)	⌞		App/Doc
Membership of a professional accounting body	⌞		App/Doc
Degree or equivalent level qualification	⌞		App/Doc
<b>Experience</b>			
Strong track record of successful financial leadership at a senior level	⌞		App/Int
Experience of developing financial reporting arrangements	⌞		App/Int
Experience of working with senior stakeholders to develop strong financial understanding	⌞		App/Int
Experience of leading finance in a multi-site operation		⌞	App/Int
Experience of a senior level finance role within the education sector		⌞	App/Int
Experience of lead operational leaders within an organisation	⌞		App/Int
<b>Knowledge</b>			
Knowledge of accounting standards within the sector		⌞	App/Int/Test
Knowledge of funding, regulatory and the legislative environment of academies and Multi Academy Trusts		⌞	App/Int/Test
Strong commercial awareness Strong track	⌞		App/Int/Test

Skills/Attributes			
Able to influence external and internal stakeholders in a way which is aligned with the ethos and culture of our organisation	κ		App/Int/Test
Able to engage and communicate effectively with a range of stakeholders, modifying style as appropriate to the audience.	κ		App/Int/Test
Able to set and deliver financial strategy which supports the delivery of organisational goals	κ		App/Int/Ref
Able to lead, develop and motivate direct and indirect reports	κ		Int/Ref
Able to explain complex financial information to non-finance professionals	κ		App/Int
Able to deliver outcomes within set timescales	κ		App/Int/Ref
Skilled in the use of ICT	κ		App/Int/Test
General Circumstances			
High ethical standards	κ		App/Int/ Ref
Entrepreneurial and able to find innovative solutions to complex problems	κ		App/Int/ Ref
Excellent analytical skills	κ		App/Int/ Ref
Sound judgement and decision making	κ		App/Int/ Ref
Able to work independently to deliver key goals, engaging others as needed	κ		App/Int/ Ref
Acts as an ambassador for the organisation at all times	κ		App/Int/ Ref
Flexibility and mental agility to manage multiple activities	κ		App/Int/ Ref
Factors not already covered			
A commitment to uphold and promote equality of opportunity	κ		App/Int/Med
Demonstrates an understanding of Safeguarding issues relevant to the post	κ		App/Int/Med
Must be able to perform all duties and tasks, with reasonable adjustment where appropriate, in accordance with the provisions of the Equality Act 2010	κ		App/Int/Med



# How to Apply

**Deadline For Applications:** 12pm Wednesday 14th June 2023

**Shortlisting:** Friday 16th June 2023

**Interviews:** 22nd June 2023 (we are unable to change this interview date.)

**Start Date:** Autumn 23

Any questions you have regarding this role and the Trust, please contact Paul Stone, CEO,




**Paul Stone: CEO, DSAT**

**Email:** [pstone@discoverytrust.org](mailto:pstone@discoverytrust.org)

**Telephone:** 07870 194191

Please apply through [My New Term Website Link](https://www.mynewterm.com/jobs/291193289/EDV-2023-DSATL-34882)

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**Discovery is an extremely  
supportive environment  
that nurtures you as  
a professional, and provides  
opportunities to connect  
with expertise across  
the trust.**

Jo Venables  
Early Years Lead




**Discovery Trust**

0116 318 4066

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