

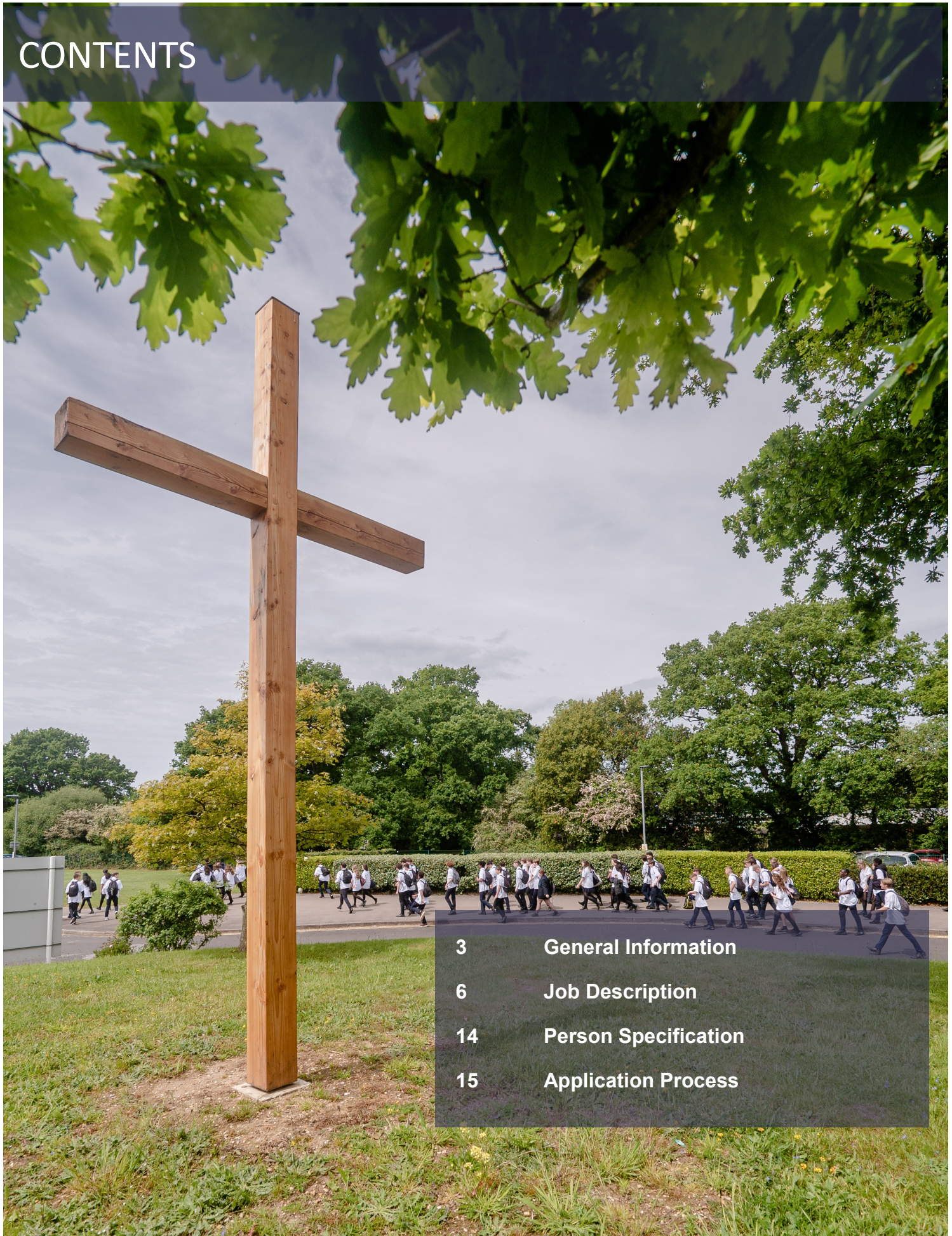
Edith Stein Catholic Academy Trust
Chief Financial Officer and
School Business Manager

APPLICATION PACK



**Edith
Stein**
Catholic
Academy
Trust

CONTENTS



3	General Information
6	Job Description
14	Person Specification
15	Application Process

GENERAL INFORMATION

Dear Prospective Candidate

Thank you for your interest in the dual role of Chief Financial Officer for Edith Stein Catholic Academy Trust (ESCAT) and Business Manager for Oaklands Catholic School and Sixth Form College.

The current postholder is retiring after eleven years of outstanding service.

The opportunity to be appointed to this hybrid role comes at a very exciting time in the development of ESCAT as it expands to fulfil the wishes of the Catholic Bishop of Portsmouth.



Background to the Trust

ESCAT currently comprises two schools within the Roman Catholic Diocese of Portsmouth; along with our other partners, we are working together to provide the best opportunities for every child in our care. The core aspect of our collaborative work is to ensure the provision of a good Catholic education for all, upholding the Bishop's mission and vision for education across the Diocese.

The Trust was initially formed in 2011 by Oaklands Catholic School under the banner of the Catholic Academy Trust in Havant. Oaklands was one of the first Catholic schools in the country to convert to an academy. The Trust changed its name to Edith Stein Catholic Academy Trust in 2017 and Corpus Christi Catholic Primary School joined ESCAT in 2021.

As a Catholic Academy Trust, our first duty is to maintain and develop our schools as living faith communities inspired by the Gospels. Whilst all Catholic schools hold to the values of the Gospels of Jesus Christ, we believe that every school is unique, serving a distinct community. Therefore, each school in ESCAT is encouraged to maintain and develop its own identity and ethos, serving its own community.

Future Growth

Up until 2022, the Catholic Diocese of Portsmouth maintained a position where most of its schools were either Voluntary Aided or part of a Catholic Multi Academy Trust. The direction of travel, supported by the Catholic Education Service is for the academisation of Catholic Schools. A position now supported by most Dioceses in England and Wales.

Following a period of discernment, consultation and information sharing, in the Spring of 2024 Bishop Philip confirmed a Diocesan Academisation Strategy for all maintained schools within the Trusteeship of the Catholic Diocese of Portsmouth. This strategy sets out a position whereby all maintained schools in the Diocese will be part of two large strong Catholic Academy Trusts.

The Edith Stein Catholic Academy Trust (ESCAT) will provide the lead in the South of the Diocese during the formation stage of this project. The ESCAT Strategic Plan has always recognised the importance of collaboration, growth and working with the Diocese.

Work has started with the schools in the South of the Diocese to fulfil the Bishop's vision, growing the Trust to approximately twenty schools. At this early stage in the process the Trust does not have the resources or capacity to support a separate CFO, hence the duality of role. The appointed candidate will however eventually assume the singleton position of CFO once the Trust has reached an appropriate size.

GENERAL INFORMATION



Responsibility for Business Manager at Oaklands

In the short term the appointed candidate will also work concurrently as the Business Manager for Oaklands Catholic School and Sixth Form College.

Oaklands is the only secondary school in ESCAT. It has nearly 1,300 students on roll, including a Sixth Form College of 200 students. It is a well established Comprehensive School, which is well supported by parents and highly respected in the community.

Oaklands offers a full range of GCSE and A Level courses. Students at all levels are provided with challenge and support as appropriate. The school's success is rooted in a strong academic tradition.

The school stands within attractive and extensive grounds including woodlands and playing fields. Well-equipped specialist facilities are provided for all areas of the curriculum. In recent years the school has won a number of successful Condition Improvement Fund bids to improve the school's facilities.

Within the Support Staff there are a number of developed teams who take responsibility for aspects of school life, including catering, HR and payroll, site and facilities management and finance.

More information can be found about Oaklands by on the website [Homepage - Oaklands Catholic School and Sixth Form College](#)

JOB DESCRIPTION

The Ideal Candidate

We are looking for someone who is commercially astute yet innovative. The appointed candidate will understand the challenges of working in the public sector, ideally schools, local authorities or the health sector. They will also have experience with company and charity accounting. The exact background and work history is less important than high level interpersonal skills and credibility in offering clear and actionable plans to help us strengthen and grow as a Trust.

The values, beliefs and mission of ESCAT are unique and define our distinctive Catholic ethos. The appointed candidate does not have to be a Catholic, but they will need to be comfortable with our values and working in our sector.

The post holder will keep ahead of funding, compliance and legislative matters providing robust, longer term strategic and budget planning that ensures the CEO and the Board of Trustees are able to make fully informed decisions.

The successful candidate will work closely with the CEO and other members of the Executive Team. They will attend Trust meetings, and they will include regularly present to the Trust Board and associated Committees, with the production of high-quality reports.

As CFO, the post holder will be responsible for all aspects of the business side of the organisation. They will ensure a cohesive approach to all strategic and operational business matters, working closely with school leaders. Initially they will line manage the central Trust, however over time, new executive roles will develop in the Trust to ensure the central Team can support a growing number of schools.

As Business Manager you will be responsible for the day-to-day financial management of Oaklands and be part of the Senior Leadership team.

The job description for this position is extensive, however with only two schools in ESCAT at this time, the majority of the work will be within the Oaklands Business Manager domain.

The scope to make an impact and to shape a great role are excellent and I hope that this opportunity excites you and that you will consider applying.

I would be delighted to speak with you in more detail ahead of your application. Please do not hesitate to arrange a visit

Yours sincerely



Marc Evans
Chair of Edith Stein Catholic Academy Trust

JOB DESCRIPTION

Chief Financial Officer (Edith Stein Catholic Academy Trust)



Main Purpose

1. To ensure the financial sustainability of the Trust.
2. To liaise with each Academy for the procurement, provision, commissioning, monitoring, quality-assurance and cost-effectiveness of services provided by the Trust.
3. To ensure that all requirements of the DfE, the Education Skills Funding Agency and the Academies Financial Handbook are met.
4. To prepare monthly consolidated accounts.
5. To prepare annual consolidated accounts and budget forecast for the Trust.
6. To produce timely, accurate and appropriate reports and financial forecasts for the Trust.
7. To consolidate the Academy budgets and hence produce the Trust's budget. Liaise with Academy Headteachers so as to achieve best value.
8. To take responsibility for the speedy and effective introduction of financial systems and processes in Academies joining the Trust.
9. To oversee the provision of appropriate business support (eg HR, finance, IT and audit) for Academies within the Trust in order to achieve best value.
10. To oversee the procedures to ensure that all Academies are compliant with the requirements of the Academies Financial Handbook and Companies House and operate under appropriate schemes of delegation.
11. To liaise with external auditors.

Strategic Leadership and Trust Development

The CFO will be accountable for supporting the Trust's strategic development and aims through effective financial planning and management, in line with regulations.

The CFO will:

1. Advise the CEO, Board and other Trust leaders on all matters relating to financial strategy and operations.
2. Contribute to the development and implementation of the Trust's strategy, providing financial analysis and guidance on all activities, setting financial objectives and monitoring performance.
3. Conduct financial due diligence on schools applying to join the Trust, and report to the Board and other Trust leaders with recommendations.
4. Contribute to the Trust's risk management efforts, including identifying strategic and operational financial risks, taking steps to mitigate these risks, and maintaining the Trust's risk register.
5. Develop, implement and monitor the Trust's business plan, using effective financial and budget modelling and benchmarking to support strong decision-making.
6. Work with the Catholic Diocese and other key stakeholders to realise the Trust's objectives and vision.
7. Work with the CEO on producing agendas for Trust board meetings and subcommittees.



JOB DESCRIPTION (continued)

Financial Management and Control

The CFO will be accountable for maintaining robust financial management of the Trust and its Academies.

The CFO will:

1. Manage the budget process, from planning through to approval, working with other Trust leaders.
2. Work with Headteachers and other Business Managers within the Trust to prepare and monitor individual Academies' budgets in line with school development plans and the Trust's strategic objectives.
3. Provide accurate and timely information to the Board and other Trust leaders to enable effective budgetary control.
4. Develop, implement and monitor the Trust's financial policies and procedures in accordance with the Academies Financial Handbook, enabling robust financial management.
5. Take appropriate action to address financial risks, problems and irregularities.
6. Develop and maintain an effective internal audit procedure for the Trust and its Academies, including producing audit reports and making recommendations for improvement, this includes any compliance checks.
7. Manage the external audit procedures for the Trust and its Academies, and follow up on any recommendations resulting from audits.
8. Establish and monitor effective procurement procedures in order to achieve financial efficiencies, including overseeing the tendering process.
9. Oversee the Trust's commercial contracts, ensuring they represent value for money.
10. Arrange and manage necessary insurance arrangements for the Trust.
11. Manage the Trust's tax and National Insurance arrangements, including ensuring claims for VAT and business rates are submitted, and refunds are received and appropriately accounted for.
12. Manage the Trust's cash position at all times, including overseeing bank deposits.
13. Support the income generation strategy for the Trust and its Academies.

Reporting and Compliance



The CFO will be accountable for ensuring that the Trust complies with its legal obligations, adheres to financial regulations, and submits accurate financial reports in a timely manner.

The CFO will:

1. Complete and submit financial returns as required by the Department for Education, the Education and Skills Funding Agency, the Charities Commission and Companies House.
2. Prepare and submit the Trust's financial returns and reports, including annual accounts and monthly management accounts.
3. Maintain the Trust's accounts in line with the funding agreement and the Academies Financial Handbook.
4. Monitor developments to legislation around payroll, pensions and benefits, implementing changes and adapting processes as required.
5. Provide other key compliance reports to the Trust Board for example on Health and Safety matters.
6. Provide appropriate and timely reports to the Trust Board and other Trust leaders to support effective leadership and governance.

Leadership and Management

The CFO will be accountable for supporting the effective management of the Trust and its Academies, and for providing motivational leadership at all levels of the Trust's organisation.

The CFO will:

1. Take responsibility for the Trust's financial management system used across schools, including managing user access, providing training, considering future system developments and generating reports.
2. Manage the central Trust finance team, taking responsibility for their development and ensuring best practice is observed at all times.
3. Develop the Trust's central finance services, ensuring these are fit for purpose and provide a high-quality service to individual schools, helping the Trust achieve continuous improvement.
4. Work with the payroll manager to support the effective delivery of payroll services for the Trust and its Academies.
5. Develop effective relationships with the Trust's stakeholders and partners in order to support its development and operation.
6. Act as a representative for the Trust in external networks and forums, raising the profile of the Trust, engaging with the wider sector, and ensuring that the Trust is alert to information and changes.



JOB DESCRIPTION (continued)

Business Manager (Oaklands Catholic School and Sixth Form College)

Main Purpose

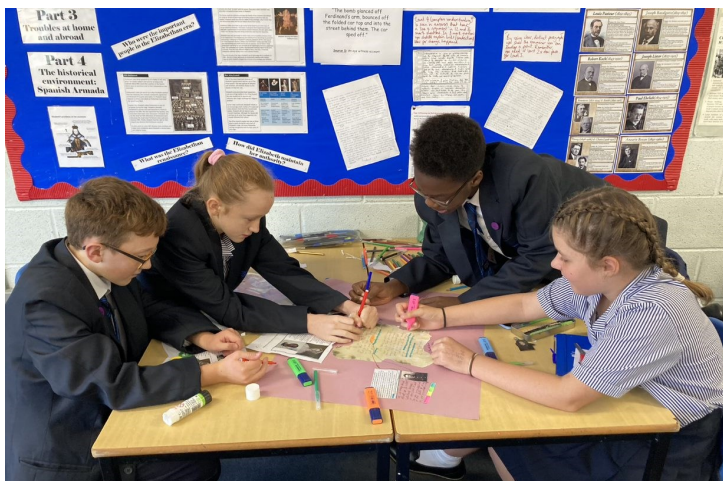
1. Lead on finance, health and safety, site management, HR and safeguarding.
2. Ensure effective systems and procedures in all aspects of school administration.
3. Provide month end finance documentation.
4. Plan and prepare budget forecast.
5. Promote the school and secure funding from various source.
6. Be a positive and enthusiastic individual who demonstrates commitment, is a strategic thinker and has effective financial management skills.

Leadership and Strategy

1. Support the Catholic ethos of the school.
2. Line manage Support Staff Managers.
3. Be responsible for line managing Support Staff, including carrying out long-term resource planning and managing recruitment, appraisal and professional development.
4. Hold weekly meetings with Support Staff Managers to ensure they are aware of key policies, strategic direction and day-to-day activity.



5. Under the direction of the Headteacher, lead on all financial matters in school, to ensure the school's successful financial performance and to ensure financial decisions are clearly linked to the school's strategic goals and the aim of the Trust.
6. Author the relevant sections within the School Development Plan to meet strategic objectives.
7. Implement school-wide changes and allocate resources in line with the school improvement plan, putting policies and procedures in place and communicating them to staff.
8. Work with others to implement a marketing plan for the school.
9. Monitor developments in technology and consider how it can be used to enhance the school's business processes, teaching and learning, and staff wellbeing.
10. As a member of the Senior Leadership Team, attend all leadership team meetings and report to Governors where appropriate.
11. Work with the Headteacher on formulating and monitoring agendas for Local Governing Body meetings.
12. Attend Local Governing Body meetings and reporting on elements relevant to the post.
13. Author school policies and procedures relevant to the post.



Financial Management and Fundraising

1. In partnership with the Headteacher, manage the school's budget and ensure it is balanced, realistic, and represents an effective use of public funds.
2. Submit the budget to the Local Governing Body.
3. Monitor the budget all year round, advising the Headteacher and Local Governing Body where revisions or changes are needed.
4. Forecast future years' budgets, based on the school's estimated funding and trends in expenditure, to enable the Headteacher to make strategic, long-term decisions.
5. Comply with financial reporting requirements and submit statutory returns.
6. Oversee school bank accounts on a day-to-day basis, ensuring money is banked, invoices are paid promptly, money owed is collected, and clear records are kept.
7. Develop and implement the school's fundraising and income generation strategy, choosing fundraising priorities in line with the school improvement plan.
8. Find and apply for grants.
9. Work closely with the Oaklands' Friends and Parents Association.
10. Lead on procurement processes, managing tenders where appropriate, conducting due diligence, benchmarking and evaluating suppliers, negotiating deals and ensuring value for money.
11. Manage the school's lettings offer.
12. Ensure the effective and efficient operation of the Finance Department, delegating tasks to finance/ office staff where appropriate.

JOB DESCRIPTION (continued)

Human Resources

1. Manage the school's payroll provision, working closely with the Trust Payroll Manager or provider.
2. Ensure that recruitment, appraisal, disciplinary and grievance policies are administered in accordance with employment law and Diocesan procedures.
3. Ensure that the school uses the HR provision provided by the Trust.
4. Conduct reviews of the school's staffing structure to ensure effective deployment of staff and financial efficiency.

Premises and Health and Safety

1. Ensure that the school meets the DfE standards for managing school premises in an efficient and legally compliant way, taking into account statutory requirements and best practice recommendations.
2. Be responsible for overseeing the quality and cost-effectiveness of the catering provision across the school and the operation of relevant hospitality services.
3. Be responsible for managing the school budget for sites (and work closely with the Site Team to ensure effective use of this, delegating aspects of this budget to the Premises and Health and Safety Manager as appropriate).
4. In liaison with other staff, supervise the effective maintenance and development of the school premises, including buildings, minibuses, fixtures, fittings and furniture, ensuring best value and compliance at all times.
5. Be responsible for maintaining an accurate asset register and establishing systems for the monitoring of this.
6. Intervene and address any issues related to health and safety.
7. Oversee the Premises and Health and Safety Manager in ensuring the school's compliance with health and safety regulations, and effective processes and procedures to ensure the safety of all in the school. This will include advising staff and organising health and safety training for staff as needed.

Compliance

1. Manage the school's compliance with statutory obligations, and advise others on the relevant legal, regulatory and ethical requirements.
2. Track all school policies and ensure they are updated in accordance with the policy review schedule.
3. Monitor and update the school risk register.

Administration

1. Keep records in accordance with the school's record retention schedule and data protection law, ensuring information security and confidentiality at all times.
2. Provide administrative support for the Headteacher and Local Governing Body.
3. Support the Data Protection Officer with ensuring data protection compliance and helping the school community understand how to comply with data protection law.



PERSON SPECIFICATION

	Essential	Desirable
Qualifications		
Degree or equivalent related professional qualification eg ADSBM related to school financial and business leadership		✓
A recognised accountancy qualification e.g. ICAEW, ACCA, CIPFA, CIMA	✓	
Chartered Accountant	✓	
Experience, Skills and Knowledge		
Experience of working within a Catholic school or Academy Trust at an appropriate level		✓
Relevant experience of working within the public sector for example, schools, local authority, health service	✓	
Able to strategically influence financial planning and decision making within an organisation	✓	
Experience in leading and managing others using strategies that would resonate with the values of ESCAT and Oaklands Catholic School	✓	
Ability to present ideas and strategies to a variety of audiences including Directors governors and external agencies	✓	
Experience of developing and implementing systems and policies, including advising senior leaders	✓	
Understanding of company and charity finances including governance, accounting and reporting requirement	✓	
Strong decision-making skills with the ability to make decision and recommendations based on the analysis of options	✓	
Managing and setting budgets, financial reporting, procurement and fixed asset accounting	✓	
Able to deliver value for money initiatives	✓	
An understanding of the educational agenda including current national policies and the statutory and legal framework governing multi-academy trusts		✓
Personal Qualities		
Highly developed interpersonal and communication skills including influencing skills	✓	
Willingness to constructively challenge the work of self and others to continually improve own and team performance	✓	
Ability to respond to changing priorities and demands	✓	
Ability to work under pressure and to meet deadlines and ensure completion of projects and tasks	✓	
Be determined and resilient in the face of challenge	✓	
Creative thinker	✓	
Team player, personable, emotionally intelligent with a good sense of humour	✓	
Other		
Commitment to safeguarding and promoting the welfare of children and young people	✓	
Willingness to undergo appropriate checks, including enhanced DBS Checks	✓	
Full driving licence	✓	
Flexible in terms of working patterns and evolution of the role	✓	

APPLICATION PROCESS

A completed CES application form can be downloaded from the school website:

[Vacancies - Oaklands Catholic School and Sixth Form College](#)

Completed applications should be sent by email to: **s.mann@oaklandscatholicschool.org**

or by post (marked 'Application' in the top left hand corner) to:

Mrs Sarah Mann
PA to the Headteacher
Oaklands Catholic School
Stakes Hill Road
Waterlooville
Hampshire
PO7 7BW

Please note that incomplete applications will not be accepted.

Closing date:

Wednesday 23rd October 2024, 12.00noon

Interviews:

Week beginning 4th November 2024

Please note on Page 11 of the application from you are required to complete a supporting statement.

The candidate application form asks for three references. Normally one of these referees should be your current or most recent employer. Please see the details in the application form. We reserve the right to take up references with your previous employer.

In addition to asking your referee questions related to your suitability for the position we will make enquires into the following:

- Disciplinary procedures in relation to allegations of inappropriate conduct with children, including any in which the penalty is 'time expired' (that is where a warning could no longer be taken into account in any new disciplinary hearing for example)
- Whether the applicant has been the subject of any safeguarding concerns
- The outcome of any enquiry or disciplinary procedure
- If the candidate is not currently working with children but has done so in the past, his or her previous employer with children will be asked about those issues.

In accordance with safeguarding guidance the school will not consider 'Open References' from a candidate.

As part of the selection process all candidates will be required to engage in the following:

- In-tray exercise
- Presentations
- Panel interviews
- Meeting with key staff
- Meeting with staff and Trustees
- Psychometric test

Preparation work in advance of the interview will be required, and details will be provided after shortlisting.

Early applications are welcome - the interview process may be staged and some interviews held in advance of the closing date if there is a large number of applicants for the role.

In accordance with Keeping Children Safe in Education, in our shortlisting process, we carry out an online search as part of our due diligence on shortlisted candidates. This may help identify any incidents or issues that have happened, and are publicly available online, which the school or college might want to explore with the applicant at interview.

Please visit our school website for more information about Oaklands and other recruitment documentation:

www.oaklandscatholicschool.org

- Supplementary Forms (to be given in at interview stage)
- Recruitment and Monitoring Form
- Rehabilitation of Offenders Act 1974 Disclosure Form
- Annual report and financial statements
- Governor Strategy
- Oaklands Catholic School Main Prospectus
- Information on Appointment of Teachers in Catholic Schools
- CES Support staff Contract
- Equality Act 2010 information



Oaklands Catholic School and Sixth Form College
Stakes Hill Road
Waterlooville
Hants
PO7 7BW

023 9225 9214
www.oaklandscatholicschool.org

