

# Applicant Pack

To be read in conjunction with our 'Join our staff' brochure



Outstanding Achievement for All

## Job Advert

**Chorus Trust** is a growing trust, committed to providing every child with the best education in both primary and secondary schools across South Yorkshire and Derbyshire. Through Chorus Trust's South Yorkshire Teaching Hub, it trains and develops teachers, giving staff and children access to the very best educational thinking and practice.

Silverdale School, Westfield School, Hope Valley College and Malin Bridge School will be joined by Eckington School on 1<sup>st</sup> April 2023. Two more primary schools will be joining the trust in September.

### **Chief Financial Officer (CFO), Chorus Education Trust**

**Pay Scale: L20-24 (£70,733 - £78,010)**

**Full time, permanent**

**To start: As soon as possible – Easter 2023**

### **About this vacancy**

This is an exciting opportunity for an experienced, dynamic, fully qualified finance professional to join a growing local trust as part of the executive leadership team, the Chief Financial Officer (CFO) will directly report to the Chief Executive Officer. The role requires a driven, dedicated, flexible and organised leader who will approach work with a positive attitude, honesty, confidentiality and integrity. With the demonstrable experience and ability to develop and deliver proactive, customer-focused services and implement change, in line with our vision, values and ethos.

The successful candidate will be able to contribute to the development and implementation of strategy and policy to support the delivery of the trusts strategic objectives, be responsible for providing strategic management and leadership of the central finance function, statutory reporting requirements, the payroll service, and another operational function dependent on expertise.

## Job Description

<b>Post Title</b>	Chief Financial Officer (CFO)
<b>Profile</b>	Leadership
<b>Grade Spinal Point Range</b>	L20-24
<b>Accountable SLT post</b>	Chief Executive Officer (CEO)
<b>Line Manager of Postholder (if different)</b>	n/a
<b>Staff to be supervised or line managed by post holder</b>	Finance Team, Payroll Team, plus 1 other central business function
<b>Post holder will work with</b>	Payroll Team, Finance Team, HR, other central and school based Administrative Support Staff
<b>Holiday and sickness relief by/ for</b>	By and for the central Finance and Payroll Team
<b>Purpose of job</b>	<p>Responsibility for the financial development and sustainability of Chorus Education Trust, and for the financial probity of the organisation. Support the CEO in their role as the Trust's accounting officer.</p> <p>Providing the strategic leadership and management of the Trust's finance and payroll operations, enabling the Trust to work effectively towards its aims and ensure the growth and success of the Trust and its schools, undertaking the role of the CFO as outlined in the Academy Trust Handbook by the ESFA/DfE.</p> <p>Member of the Central Trust executive team.</p> <p>This post may work across the Trust schools.</p>
<b>Version revised:</b>	Jan 2023

The post holder must at all times carry out their responsibilities within the spirit of school and trust policies and within the framework of legislation relating to Academies and Education, with particular regard to the statutory responsibilities of the Trust and the Governing Body of the School(s).

**Specific duties and responsibilities:**

To lead the finance and payroll team and provide support and advice services for the academies within the Trust. To provide strategic development of the finance and payroll services, to ensure that efficient and effective processes and systems are developed to support the Trust's opportunities for future growth/expansion. To lead 1 other core operational function, depending on postholder skillset (IT, HR, Estates & H&S, Marketing, Governance and Compliance). This will include, but not be limited to:

**Strategic leadership and Trust development**

- Accountable for supporting the Trust's strategic development and aims through effective financial planning and management, in line with regulations.
- Advise the CEO, COO, Trustees and other Trust leaders on all matters relating to financial strategy.
- Contribute to the development and implementation of the Trust's strategy, providing thorough financial analysis.
- Conduct financial due diligence on schools applying to join the Trust, and report to the CEO, COO and Trustees with recommendations.
- 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 asset and risk registers.
- Develop, implement and monitor the Trust's business plan, using effective financial and budget modelling and benchmarking to support strong decision-making.

**Financial management and control**

- The CFO will be accountable for maintaining robust financial management of the Trust and its academies.
- Ensure long-term financial sustainability, manage the budget process (from planning through to approval, working with other Trust leaders).
- Work with the CEO and COO to prepare individual academies' budgets and monitor in line with school development plans and the Trust's strategic objective.
- Provide accurate and timely information to the CEO, COO and Trustees to enable effective budgetary control including monthly management accounts and budget monitoring reports.
- Provide a report for each Trustees meeting detailing the financial position of the Trust, budget monitoring information, cash flow reporting and provide information regarding the internal and external audits plus any accompanying reports.
- Develop, implement, monitor and review the Trust's financial policies and procedures in accordance with the Academies Handbook, enabling robust financial

management whilst ensuring that all finance staff across the Trust adhere to these policies and procedures.

- Take appropriate action to address financial risks, problems and irregularities.
- Lead, develop and maintain an effective internal audit procedure for the Trust and its academies, liaise with the provider and the Audit Committee, responding to audit reports and making recommendations for improvement in line with the internal audit programme.
- Manage the external audit procedures for the Trust and its academies, and follow up on any recommendations, leading on implementing audit improvement points.
- 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.
- Ensure an appropriate policy for partial exemption is in place and that this is adhered to by finance staff.
- Manage the Trust's cash position at all times, including overseeing bank deposits and managing the investments in line with the investment policy to maximise safe returns.
- Support the income generation strategy for the Trust and its academies.
- Ensure that any funding changes are reported to the CEO and COO immediately and that all alerts from the DfE and ESFA are actioned immediately ensuring that any additional funding is applied for.
- Lead the procurement strategy and ensure policies and procedures for buying and ordering supplies and services are compliant, efficient and generating economies of scale.
- Work with the COO to oversee the management of contracts and service level agreements to achieve maximum value for money as the Trust grows. Negotiating contracts to ensure best value.
- Work alongside the Trust Estates Manager to identify capital grant opportunities and oversee the preparation of capital grant bids.
- In collaboration with the CEO, COO and Trust Estates Manager prepare a rolling programme of capital purchase plans and detail the financial implications of such
- Maintain the fixed asset register with regards acquisitions, disposals and depreciation.

#### **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.
- Complete and submit financial returns as required by the Department for Education, the Education and Skills Funding Agency, the Charities Commission and Companies House.
- Prepare and submit the Trust's financial returns and reports, including annual accounts and monthly management accounts.

- Maintain the Trust's accounts in line with the funding agreement and the Academies Handbook.
- Assist the Payroll Manager and HR Manager to monitor developments to legislation around payroll, pensions and benefits, implementing changes and adapting processes as required.
- Provide appropriate and timely reports to the CEO, COO and Trustees 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.
- Take responsibility for the Trust's financial management system (currently PSF), and budgeting system (currently Access), including managing user access, providing training, considering future system developments and generating reports.
- Manage the central finance team, ensuring that weekly line management meetings take place, taking responsibility for their professional development and ensuring best practice is observed at all times.
- Ensure adequate training on the Trust's financial management system is rolled out to Operation Managers and supporting them where required.
- 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.
- Work with the Payroll Manager and HR Manager to support the effective delivery of payroll services for the Trust and its academies, currently utilising Access People.
- Develop effective relationships with the Trust's stakeholders and partners in order to support its development and operation.
- Work with the COO to 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, changes and opportunities that could affect its work.

#### **Support for Trust/School (included in all roles)**

- Be aware of and comply with policies and procedures relating to child protection, health, safety and security, confidentiality and data protection, reporting all concerns to an appropriate person
- Be aware of and support difference and ensure all pupils have equal access to opportunities to learn and develop
- Appreciate and support the role of other professionals
- Attend and participate in relevant meetings as required
- From time to time, to meet the needs of the Trust, you may be asked but not automatically expected to work hours additional to your normal working hours. The Trust will give you as much notice as possible and you will be

paid/recompensed for such work. Examples where this might be required are, for example, finance month end, tight payroll deadlines, to meet pension submission deadlines etc.

- Assist with the clerical duties of the administration team as required from time to time and as appropriate to your role
- Contribute to the overall ethos/work/aims of the Trust/school
- Participate in relevant training, other learning activities and performance management as required
- To undertake any other duties and responsibilities, commensurate with the level of the post, as may be determined after negotiation between management, the postholder and appropriate trade unions
- Team responsibilities - All Business support staff are considered part of the overall support team and may be required to provide assistance to colleagues in other areas from time to time commensurate with the role, skillset and grade.

**Further Statement:** The above duties are not exhaustive and the post holder may be required to undertake tasks, roles and responsibilities as may be reasonably assigned to them by the CEO or CFO. The job description and allocation of particular responsibilities will be kept under review and may be amended via consultation with individuals, the Governing Body or Board of Trustees and/or Senior leadership team as required. Trade Union representation will be welcomed in any such discussions.

## Person Specification

	JOB REQUIREMENTS	Essential	Desirable	Assessment method
<b>Knowledge, Experience and Skills</b>	Senior financial management and strategic leadership either in the public or private sector with accountability for a complex resource base	✓		A/I
	Proven track record of successful financial leadership and building effective teams	✓		A/I
	Significant experience of leading and managing budgets, and working with stakeholders to develop strong financial understanding	✓		A/I
	Experience of developing and managing external relationships with professional and regulatory bodies	✓		A/I
	Experience of working within an educational environment at scale		✓	A/I
	Change management experience in rapid high change environments/ settings		✓	A/I
	Experience of working with Governors, Trustees, or similar		✓	A/I
	Experience of managing multi-site and multi-disciplinary teams		✓	A/I
	Experience of implementing and establishing financial systems and processes, maintaining strong financial controls		✓	A/I
	Experience of working with external and internal audit teams		✓	A/I
	Experience in the evaluation, documentation and management of risk (financial and non-financial)		✓	A/I
	Detailed and up to date knowledge of accounting and professional codes of practice	✓		A/I
	Understanding of month-end and year-end processes and procedures including the production of management accounts	✓		A/I



	Detailed understanding and application of complex control processes and reconciliations	✓		A/I
	Knowledge of academy funding streams, financial reporting; including statutory accounting, the academies handbook and other ESFA returns		✓	A/I
	Practical experience and understanding of procurement processes and procedures to ensure Value for Money	✓		A/I
	Experience of managing an in-house payroll system		✓	A/I
	Up to date knowledge of payroll and pension legislations	✓		A/I
	Experience of pension scheme administration (Teachers' Pension and Local Government Pension Schemes)		✓	A/I
	Knowledge of HMRC requirements including VAT and payroll compliance	✓		A/I
<b>Qualifications</b>	Professional Accountancy Qualification (ACA, ACCA, CIMA or equivalent)	✓		A
	Educated to degree level or equivalent	✓		A
	Good level of literacy and numeracy e.g. GCSE Maths and English Grade C or level 5	✓		A
	Evidence of commitment to continuing professional development of self and others.	✓		A/I
<b>Other Skills</b>	Self-starter with ability to organise time and work to tight multiple deadlines, keeping calm under pressure	✓		A/I
	Meticulous attention to detail	✓		A/I
	Good organisational, prioritisation and record keeping skills	✓		A/I
	Excellent analytical skills and ability to summarise findings	✓		A/I
	Ability to anticipate and resolve issues	✓		A/I
	Proficient in use and knowledge of IT systems including Microsoft Excel.	✓		A/I
	Ability to work in sensitive environment and maintain strict confidentiality of information	✓		A/I
<b>Interpersonal Skills</b>	Highly motivated with a can-do attitude and a positive demeanour	✓		A/I
	Confidence to set a strategic direction and hold others to account	✓		A/I
	Team player with excellent leadership, communication (oral and written) and interpersonal skills	✓		A/I

	Proven track record of building strong personal relationships and credibility at senior level across all internal functions and with key stakeholders	✓		A/I
<b>Child Protection</b>	A commitment to the responsibility of safeguarding and promoting the welfare of young people	✓		I/Ref

The role of Chief Financial Officer calls for a finance professional with the necessary experience, skills and personal qualities to be able to operate as part of a close-knit executive team. There is an important role to play leading the finance team in providing a robust financial infrastructure as well as an excellent opportunity to play an important and active part in the strategic direction of this forward-looking, successful and thriving Trust.

The post holder:

- will be expected to have a degree or equivalent qualification
- will hold a full qualification from a major accountancy body (ICAEW, ACCA, CIMA)
- should be able to demonstrate a track record of successful financial leadership and building effective teams
- should have financial reporting and management skills, and experience of working with stakeholders to develop strong financial understanding and empathy across an organisation
- should have high ethical standards and influencing skills with the ability to engage effectively with all staff across the Trust, trustees and governing bodies.
- should have excellent analytical skills and sound judgment
- should have excellent communication and presentational skills
- should have experience of managing change within a financial context
- should have experience of financial information systems and be computer literate
- should have a good knowledge of the funding, regulatory and legislative environment of academy trusts

## Application procedure

Applications should be made by completing the application form in detail and by a letter of application of not more than two typed sides of A4 in length. CVs will not be considered.

The section of the form entitled 'Suitability for the Job' should address the contents of the Person Specification enclosed and should include details of experience and qualities which equip you for the post. A covering letter in lieu of completing this section is acceptable.

Completed application forms and letters should be emailed to Jill Rishworth via [recruitment@chorustrust.org](mailto:recruitment@chorustrust.org) and should arrive no later than **11:59pm on Sunday 26 February 2023**.

All applicants are asked to supply a telephone number and an email address for each referee quoted on their application form so that contact can be made without delay.

The two-day interview process will take place the week **commencing Monday 6 March 2023**. Details of the interview arrangements will be sent to all shortlisted candidates.

Potential candidates are encouraged to arrange to visit one of the trust schools for a discussion with the CEO. Please contact [nmason@chorustrust.org](mailto:nmason@chorustrust.org) to arrange this.

Please understand that we cannot acknowledge receipt of individual applications.

*At Chorus Trust we are committed to the safeguarding of all our pupils, please visit our website to access our safeguarding & child protection policy: [www.chorustrust.org/policies](http://www.chorustrust.org/policies)*

*The successful candidate will be required to complete a Disclosure & Barring check in line with the Rehabilitation of Offenders Act (ROA) 1974 (Exceptions) Order 1975 and the Police Act Regulations*

## Further information

Further information about Chorus Trust and its schools is available at:

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Chorus Education Trust: [www.chorustrust.org](http://www.chorustrust.org)

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Eckington School and Sixth Form: [www.eckington.net](http://www.eckington.net)

Hope Valley College: [www.hopevalley-chorustrust.org](http://www.hopevalley-chorustrust.org)

Hope Valley Pathways: [www.hopevalley-chorustrust.org/hopevalleypathways](http://www.hopevalley-chorustrust.org/hopevalleypathways)

Silverdale School: [www.silverdale-chorustrust.org](http://www.silverdale-chorustrust.org)

Silverdale Sixth Form: [www.silverdale-chorustrust.org/joinoursixthform](http://www.silverdale-chorustrust.org/joinoursixthform)

Westfield School: [www.westfield-chorustrust.org](http://www.westfield-chorustrust.org)

Malin Bridge Primary School and Nursery: [www.malinbridgeprimary.co.uk](http://www.malinbridgeprimary.co.uk)

South Yorkshire Teaching Hub: [www.southyorkshireteachinghub.org](http://www.southyorkshireteachinghub.org)

National Modern Languages SCITT: [www.nationalmodernlanguages.com](http://www.nationalmodernlanguages.com)

Sheffield Teacher Training Alliance: [www.sheffieldtta.org](http://www.sheffieldtta.org)

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