

Your next Chapter awaits....

Director of Finance and Operations

Information Pack



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Welcome from Sue Samson, CEO



Thank you for your interest in the Director of Finance and Operations post at the University of Chichester Academy Trust.

I hope this information pack will provide you with an insight into the University of Chichester Academy Trust ('the Trust') and its ethos and values and will inspire you to make an application for the post.

We have built a strong reputation as a Multi-Academy Trust that provides exceptional support for its children and staff and provides system leadership across the region. We have a strong belief in a shared approach to delivery, where our executive team is encouraged to work with our headteachers and business managers to share their expertise and work together to ensure the viability and sustainability of the Trust. The purpose of our finance and operations function is to provide the systems and structures which enable us to meet our vision and deliver our aims.

Although all of our academies are unique, with their own strengths and challenges, you will find across the Trust there is a collective energy for collaboration. This is enhanced by our partnership with the University of Chichester, where the Institute of Education brings over 180 years of experience in the training of teachers and is fully engaged in the work of our academies.

The current postholder is due to retire and as a Chief Financial Officer, Operations Manager, Company Secretary and Data Protection Officer of the Trust, we are reaching out to individuals who not only have an exceptional financial and accounting background, but also have the qualities to be an inspiring leader, successfully manage conversions, procurement and capital projects that enable the Trust to continue on its projected growth plan and deliver its financial strategy.

We are a growing Trust and are all on a continuous journey of discovery and learning. If you share our passion and commitment to making a difference to the lives of all children and young people, have the expertise we are seeking and are enthusiastic about the prospect of a new chapter in your career, we would be delighted to talk with you and answer any questions you may have.

Jacqui Farrell, PA, would be pleased to arrange a meeting and can be contacted at j.farrell@chi.ac.uk.

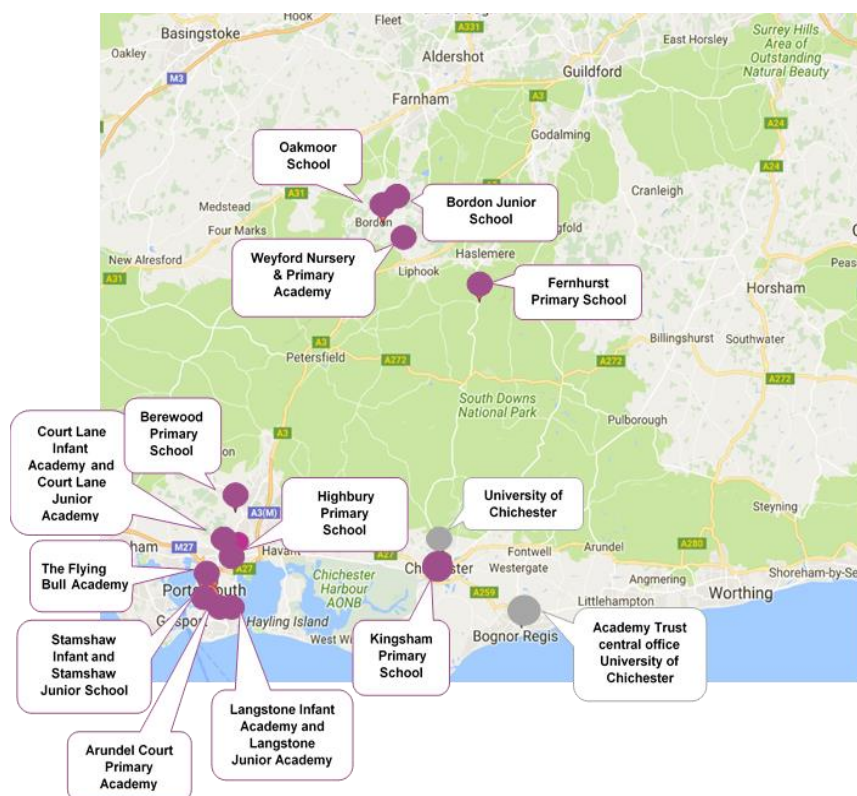
A handwritten signature in black ink that reads "Sue Samson".

Sue Samson MA (Ed), MBE
CEO, University of Chichester Academy Trust

"The Trust's vision to inspire young people, raise aspirations and transform life chances is shared by the school leaders and governors. Strong and effective relationships exist between trustees, the trust's officers, governors and headteachers."

Ofsted Review of the Trust, 2017

About Us



The University of Chichester Academy Trust is uniquely placed to make a difference to the local education landscape. Established by the University of Chichester in 2012, whose heritage in education dates back to 1839, the Trust has access to the University's extensive resources, providing educational expertise from the University's Institute of Education and from other education professionals.

The Trust has a great reputation of providing pupils and staff alike with the opportunity to achieve excellence within a stimulating and supportive environment. With 15 academies in its educational family, it remains the Trust's strategic intention

to ultimately grow to c20-30 academies in the neighbouring counties of Hampshire, Portsmouth and West Sussex geographically situated in clusters but also operating as a single family. This will enable the academies to work together and share best practice, whilst also benefiting from expertise across the group.

Our Academies joined the Trust because they wish to work with like-minded schools who have a shared passion for pupil centred learning and a desire to work together for the benefit of the wider community that we serve.

Our children and young people deserve the best, inspired to reach for their stars and dreams, achieving aspirational goals. We know this can only be achieved through the incredible work our people do every day and we value each and every one. In return, we offer all employees opportunities for development and personal achievement in inclusive and vibrant environments across the Trust.

All of our Academies are unique and are encouraged to develop a curriculum and extended educational opportunities to meet the needs of the children and the communities that they serve. The Trust has an inclusive ethos and an aspirational vision. People and relationships matter to us and we share the University's belief that education has the power to transform society.

Working across local authority boundaries is a great strength and has added value to all and having the opportunity to share resources with local schools is also an important element of our strategy. We work closely with the local authorities and with other schools in the wider education community. We contribute to the Portsmouth Education Partnership and to the Whitehill and Bordon regeneration programme where we promote education as a transformational strategy.

Vision, Mission, Values and Governance

The Vision of the Trust is for all young people to be inspired by an excellent education that raises their aspirations and enriches their lives.

The Mission of the Trust is to create a vibrant, inclusive and aspirational family of academies, transforming life chances for pupils through excellent teaching, learning and leadership.

Our Shared Values Are:

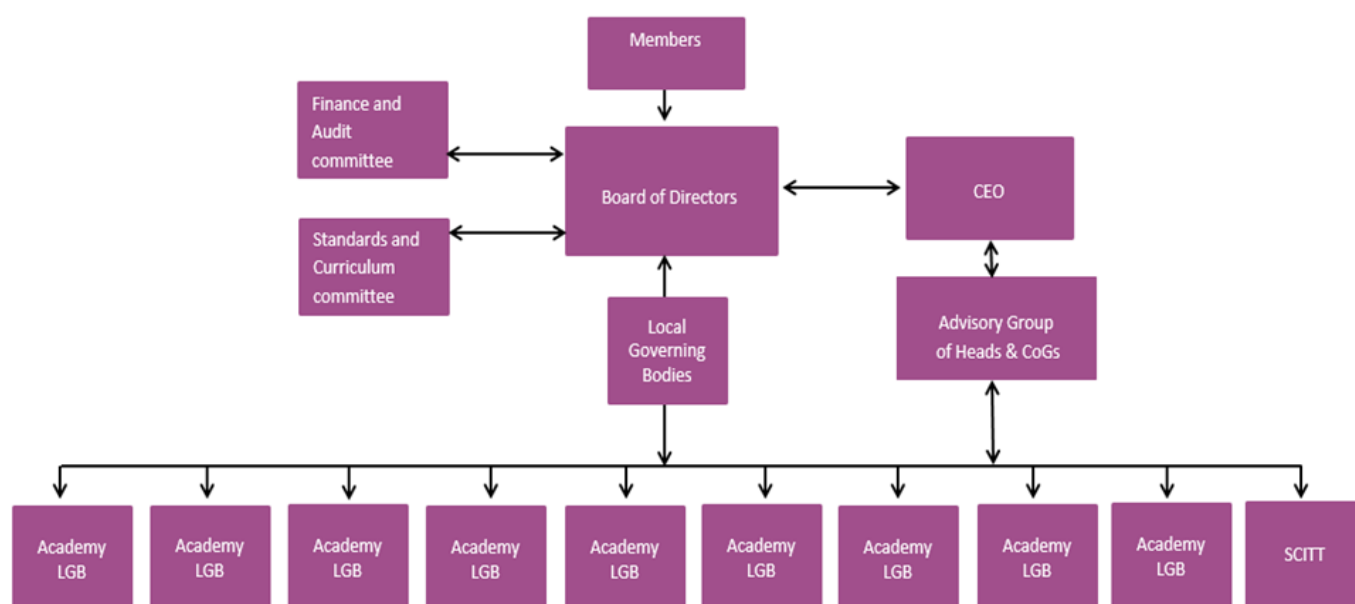
- Aspirational
- Inclusive
- Collaborative
- Dynamic
- Evidence Based
- People focused

Governance

Academy trusts are charitable companies and the trustees are company directors and must comply with company law requirements. The Chair of the Board of Trustees is also a Member of the Trust, thereby ensuring a link between the two layers. The Members have ultimate control of the Trust with the ability to appoint one of the Trustees and the right to amend the Articles of Association.

In 2020 the Members were operating under revised Articles of Association to bring them in line with the DfE's revised recommendations to have a greater separation between Members and Trustees.

The Director of Finance and Operations reports regularly to the Finance and Audit Committee and supports the Chair with the administration of Trust Board and Member meetings, advising the Chair on legal compliance and adherence to the governance framework.



Introducing our Academies

Although we share the same vision and values, you will find each of our academies have their own identity which defines them within their local community.

The Trust is strongly committed to valuing the uniqueness of each school, with governance, through local governing bodies, playing an important role to achieve this.



Local Governing Body

Local governors are appointed by the Trust to reflect the local community and ensure that the needs of the children are met. These local governing bodies have responsibility delegated from the Trustees through a Scheme of Delegation. Levels of delegation to a local governing body are differentiated depending upon the circumstances of the school and the capacity of the local governing body to deliver.

Our Chairs of Governors are highly valued and form an integral part of the leadership and governance of the Trust.

“Schools have access to expert assistance to financial and legal matters, human resources and premises management. School leaders value this effective support highly.... This enables school leaders to focus on improving teaching and learning.”

Ofsted Trust Review, July 2017

Leadership Team

Led by the Chief Executive Officer, the Director of Standards & Effectiveness, Director of Finance and Operations, Headteachers and the Principal of the SCITT form the Trust Leadership team. In addition, the CEO, Directors and HR Manager form an Executive team to draw on differing perspectives for a joined-up approach to central work.

This team has a wide range of expertise and work together to ensure that the whole Trust benefits from this rich experience and that the Trust is genuinely stronger than the sum of its parts.

Strategic aims of the Trust are to:

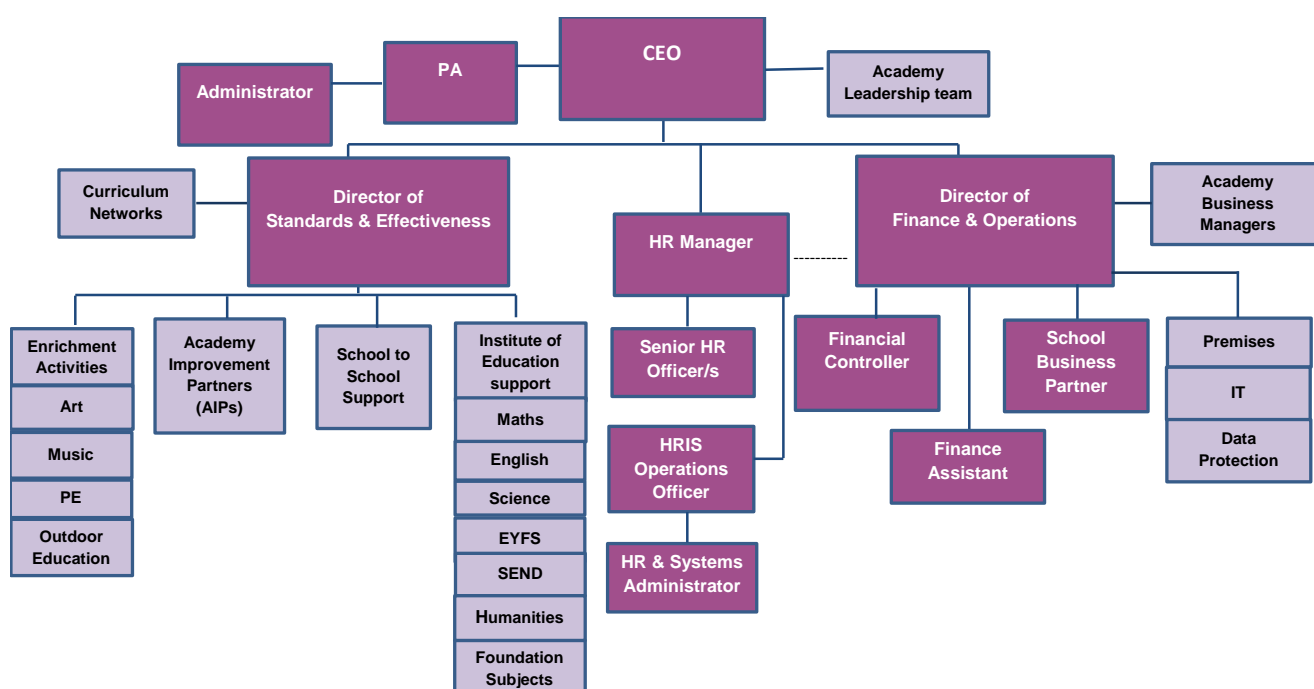
- Promote high aspirations and success for all.
- Ensure progressive and sustained improvement in standards of education and pupils' rates of progress.
- Create a creative, dynamic, engaging and relevant curriculum delivered by high quality staff, in order to deliver excellent outcomes for all children.
- Develop learning environments which engage and inspire pupils' learning and development.
- Value and ensure the continual professional learning of all staff.
- Support and build leadership and management capacity within and across academies.
- Develop a local learning community where parents and carers are valued and encouraged to engage.
- Embrace opportunities presented by the new educational landscape in a way that is coherent with our strategic direction.
- Generate levels of surplus, sufficient to secure sustainability and create funds to support investment in our academies and the delivery of our vision.
- Achieve a shared sense of mission and belonging across our community of academies, so that the vision is owned by the whole Trust and understood by our partners.
- Work collaboratively with other academies within the Trust and with other schools/academies within the wider community, sharing resources, knowledge and best practice and supporting each other.

Priorities for 2021:

- ❖ Improve attainment and progress in reading, writing and mathematics, as well as the wider curriculum so every child, but particularly those from disadvantaged backgrounds, is ready to make the most of the next stage of their education. *This will include a focus on COVID catch-up programmes.*
- ❖ Enhance our digital provision so it keeps ahead of changing demand and expectation. *This will include enhanced collaboration through digital methods and remote education.*
- ❖ Ensure our leadership and governance remains robust and secure throughout lockdown and changing restrictions making good use of electronic as well as face to face communication (where possible) and ensuring the wellbeing of our school leaders.
- ❖ Develop and support our staff, maintaining our focus on being an employer of choice, supporting their personal growth and their professional learning, as well as their health and safety and wellbeing.
- ❖ Maintain financial sustainability and utilise any available funds to support COVID Catch-Up, the development of our digital strategy, and remote learning as well as considering opportunities to invest in new areas for collaboration and innovation.
- ❖ Improve the quality of our learning environments in schools who need it the most, focusing on both condition needs and strategic needs to meet our Trust-wide aims and objectives and in the context of reducing our carbon footprint.

The Post

Director of Finance and Operations



As the Trust evolves, the responsibility and line management may change to fit organisational needs, in agreement with the CEO.

Job Profile

Job No: 0001BVS

Job Title: Director of Finance and Operations

Reports to: Chief Executive Officer

Location: The normal place of work will be the Bognor Regis Campus, or such other place as may reasonably be required. The post holder will be required to visit academies across the Trust once it is safe to do so.

The Trust offers a safe environment in which to work, meeting government guidelines to protect staff during Covid-19 pandemic, which means you may be required to work remotely at times.

Function of the Post:

The Director of Finance and Operations is a key member of the Executive team ensuring that finance and operations supports the mission and vision of the Trust and is delivered in a way that models the Trust values.

The postholder is the Chief Financial Officer, the senior officer responsible for the financial systems and strategy and is also the senior executive tasked with overseeing the operational functions of the Trust. The post holder will also contribute to strong Trust governance by acting as Company Secretary and Data Protection Officer and will play a significant role in contributing to the risk management process.

The post holder will be expected to work flexibly within the broad areas of responsibility outlined below and as agreed with the CEO.

Principal Accountabilities:

1. As a senior manager, and a member of the Trust Executive Team, contribute to the overall strategic leadership of the University of Chichester Academy Trust ('the Trust')
2. Lead on financial governance, accountability and compliance throughout the Trust on behalf of the Accounting Officer, to ensure adherence to the Academies Financial Handbook, Trust Financial Procedures and other ESFA (Education and Skills Funding Agency) requirements. Ensure that the Audit process delivers value and contributes to effective financial governance. Develop and deliver the Trust Financial Strategy and act as the first point of contact with the ESFA on funding matters and areas of regulatory compliance.
3. Lead the three-year financial planning process and the annual operational delivery and quality assurance for the Trust, setting strategic priorities, guiding and supporting academies, and ensuring that financial plans are in line with the Trust's strategic priorities. Prepare and submit consolidated annual budgets and longer-term financial plans that meet all statutory requirements and comply with the Academies Financial Handbook and all funding agreements. Ensure statutory filing is carried out in a timely manner.

4. Lead on all financial reporting, both statutory external reporting (ESFA, Companies House, DfE), including tax reporting and internal management reporting to the Accounting Officer and Trustees. Ensure that financial reports are clear and concise and prepared in a suitable format to support strong strategic oversight and decision-making. This will include working closely with the HR function on matters that impact finance, statutory reporting and wider operations. Ensure that statutory submissions are prepared in a timely manner and submitted to ESFA and Companies House according to published deadlines.
5. Undertake strategic oversight of and oversee the procurement, implementation and development of wider business systems to improve efficiency and effectiveness of the Trust, to include the purchasing of services from the University of Chichester.
6. Undertake strategic oversight of IT service providers in individual academies; work with them to ensure compliance with Trust Electronic Information Security Policy and other Trust-wide IT policies including on cyber-security. Support the delivery of the Digital Strategy.
7. Act as Company Secretary working with the Chair and CEO to ensure the Trust complies with ESFA requirements, company and charity law. Maintain, and update as necessary, statutory documents and databases. Submit annual returns to Companies House. Ensure that all Related Parties are declared and managed in line with the Trust Conflict of Interest and Related Parties policy and advise on legal agreements, including contracts, in conjunction with legal advisers. Act as Data Protection Officer for the Trust, ensuring compliance with Data Protection legislation, including GDPR.
8. As Clerk to the Board, support the Chair with the administration of Trust Board and Member meetings, advise the Chair on legal compliance and adherence to the governance framework and provide advice to the academies local governing bodies. Support the recruitment and induction of new Trustees and Members. Ensure that a review of skills is undertaken regularly, and that Trustees are provided with regular opportunities for training and keeping their knowledge up to date. Manage the Trust Risk Register.
9. Lead on the due diligence and legal conversion of new academies, alongside Trust legal advisers, and ensure that the Supplemental Funding Agreement, Lease and the Commercial Transfer Agreement are in line with DfE requirements and protect the position of the Trustees in relation to known risks. Work closely with the DfE lead on that conversion.
10. Undertake strategic oversight of capital projects, in conjunction with Trust's appointed surveyors. Ensure compliance with grant funding agreements and lease agreements. Undertake strategic management of the contract and budget/costs and ensure timely reporting to ESFA and Trustees. Ensure that all academies comply with ESFA and RPA (Risk Protection Arrangement) requirements regarding Health and Safety, managing risk and ensuring business continuity. Undertake strategic oversight and management of H&S. Undertake strategic oversight of Estate Management and Carbon Reduction Plans and work with academy staff, surveyors and property-advisers to ensure good, sustainable estate management across the Trust.
11. Build strong working relationships with academies, monitoring their financial performance, advising them on strategies to improve their financial position, advocating on their behalf to secure additional funding streams and supporting them to operate effectively in all the areas covered by this post.
12. As a line manager, ensure all aspects of staff management are effectively carried out e.g. recruitment and selection, induction and training, performance management,

absence management, record keeping, consultation and effective communication, in accordance with University policies and procedures. This will include conducting annual performance reviews using the Trust's Performance Review and Development Plan (PRDP) Scheme.

Other Duties:

You are required to undertake such other duties appropriate to the grade and content of the work as may reasonably be required of you. Therefore, the list of duties in this job profile should not be regarded as exclusive or exhaustive. Please note that, in consultation with you, The University of Chichester Academy Trust reserves the right to update your job profile to reflect changes in, or to, your post.

Equality and Inclusion:

We believe that everyone has the right to be treated equally and that the diversity of individuals and groups should be embraced, valued, and respected. We are committed to eliminating any form of discrimination be it direct, indirect, harassment or victimisation, and to support this the Trust has a number of policies that you should ensure you are familiar with and compliant to. All policies are available from HR. Any breaches may lead to termination of employment.

Right to Work:

Current British Law states that a person cannot be employed to this post if they do not have permission to live and work in the UK. For further guidance and information contact HR.

Health & Safety:

You are responsible for ensuring that workplace responsibilities are carried out with full regard to, and in support of, the Health and Safety Policies, which you should familiarise yourself with.

Sustainability and Environment:

The University of Chichester Academy Trust is committed to sustainable development and environmental initiatives and is continuously seeking to find ways to improve its environmental performance. Staff are required to support these aims.

Data Protection:

You will be responsible for ensuring that workplace responsibilities such as confidentiality, treatment of personal information and records management are carried out in compliance with the requirements of the Data Protection Act 2018 and the Employment Practices Data Protection Code 2002.

Safer Recruitment:

The University of Chichester Academy Trust is committed to safeguarding and promoting the welfare of children and young people and expect all staff to share this commitment. We will ensure that all our recruitment and selection practices reflect this commitment.

New members of staff will be required to apply for Disclosure Service certification as part of the Trust's recruitment process. Further information about the Disclosure and Barring Service is available from the DBS website at www.gov.uk/dbs. Under the Rehabilitation of Offenders Act 1974 (Exceptions) Order 1075, applicants for teaching posts are among those who are not entitled to withhold information about any previous criminal conviction.

Person Specification:

Essential requirements are those, without which, you would not be able to do the job. It is expected you will have the knowledge and qualifications indicated, or equivalent qualifications and experience.

Desirable requirements are those which would be ideal if you had and will be considered when more than one applicant meets the essential requirements.

	E	D	Evidenced through
Knowledge and Qualifications			
Educated to degree level or equivalent	✓		Application Form
CCAB Qualified Accountant (ICAEW, ACCA, CIPFA, CIMA) and subject to the oversight by a professional body that upholds professional standards and evidence of appropriate continuous professional development (CPD) as required by the ESFA	✓		Interview Process
Understanding of the legal and financial regs and procedures relevant to the academy sector incl. VAT and Tax, charity SORP, AAD, AFH and company law; ideally with current knowledge of academy funding	✓		
A general knowledge and understanding of some of the non-financial aspects of the role, e.g. contract law, public procurement, data protection, H&S, Capital projects, Employment law, IT, Premises	✓		
Skills			
High level of IT literacy and with exceptional analytical skills, able to analyse complex data and information and use it to develop, monitor and support strategic and operational planning	✓		Application Form
Proven strong leadership and organisational skills to develop strategy and coherent plans in consultation with a range of stakeholders, whilst successfully supporting and leading individuals and cross-functional teams	✓		Interview Process
Well-developed interpersonal skills and proven successful oral and written communication and presentation skills that enables; effective collaboration and working at both strategic and operational level; complex financial ideas to be articulated to non-financial persons; ability to build rapport quickly and effectively with a wide set of stakeholders	✓		
Flexibility, creativity and professionalism required to liaise, and negotiate, at all levels both internally and externally, with the ability to challenge positively and to respond positively to challenge	✓		
Experience			
Experience of managing significant resources, within a recognised Finance department or similar environment, delegating responsibility as necessary	✓		Application Form
Experience of developing and managing strategic financial plans, at both local and consolidated level	✓		Interview Process
Experience of Influencing decision making through analysis and presentation of complex financial information presented in a straightforward way	✓		
Managing complex budgets effectively, ensuring financial propriety and compliance with relevant legislation	✓		
Relevant current experience of financial management at a senior level required for this post, ideally in a MAT, public or charity sector setting	✓		

Evidence of a track record of contributing significantly to the leadership of an effective and complex organisation	✓		
Experience of working with external auditors in the preparation of annual reports, accounts and for internal audits	✓		
Proven experience of successfully leading, managing and co-ordinating complex teams, with an ability to support, inspire and develop staff at all levels	✓		
Experience of successfully preparing/analysing business cases and investment appraisals that have had a positive impact on the organisation	✓		
Demonstrable evidence of effective negotiating and managing performance of external service contracts, including OJEU compliance		✓	
Experience of management of fixed assets, procurement and contract management		✓	
Experience as Clerk to the Governors and, or, Company Secretary experience		✓	
Evidence of successful project management, planning, managing and monitoring of work streams and KPIs		✓	
Knowledge of integrated curriculum financial planning, resource management and benchmarking systems and using them to inform, advise and plan future financial best practice		✓	
Personal attributes			
Strong leadership and motivational skills to successfully lead and support cross-functional and multi-site teams	✓		Interview Process
Commitment to the values of the Trust, the promotion of equality and inclusion, and its aim to improve life chances of all children through the provision of quality education	✓		
Demonstrates diplomacy, tact, honesty, integrity, and transparency and a strong commitment to the Nolan Principles of Public Life	✓		
An outstanding persuasive communicator, with political awareness, able to build and maintain effective corporate relationships	✓		
Pro-active, solutions focused and results-orientated style. Taking ownership of relevant financial and business risks with personal drive, tenacity and resilience when faced with complex, demanding situations and competing deadlines.	✓		
Adaptable and flexible to respond to changing requirements in a positive and enthusiastic manner that secures trust and confidence, willing to be involved at all levels	✓		
Calm, emotionally regulated behaviour, even when faced with challenges: Extremely emotionally resilient and self-aware	✓		

“We [Headteachers and academy leadership teams] benefit from excellent financial expertise that has enabled streamlining of some operations across the Trust to achieve financial and non-financial gains. Ultimately, this has enabled enhanced provision, benefitting every child in our Trust by allowing us to improve our child centred offer in every academy”.

Paul Hemmings, Headteacher, Oakmoor School, Bordon

What we Offer

Your Career

- A strong commitment to continuing professional development and support for your personal leadership journey
- Opportunities for shared learning and collaboration across the University of Chichester Academy Trust and the wider network
- Extensive professional and personal development opportunities
- To help shape the future of a successful and innovative Trust

Be part of something bigger

- A system leader in the local and regional stage
- A strong and supportive Board
- The opportunity to join the Trust's Academy Leadership team who are committed to a shared set of values to make a difference as we drive improvement in a changing world
- A collaborative Trust which inspires innovation and the motivation for leaders to influence and shape the strategy of the wider Trust and the educational landscape

Making a difference

- An infectious energy and enthusiasm to be part of a team that makes a difference to the life chances of our children and young people
- Contributing to the creation of a culture and environment in which staff feel valued, are inspired and work in buildings which promote and enhance child progress and learning

Staff Benefits

- Local Government Pension Scheme
- Extensive employee assistance provision including 24/7 telephone helpline and counselling
- Lifestyle health and wellbeing programme
- Generous leave entitlement
- University Staff Development Programme
- Access to the University's vast Library resources
- Gym Discount
- Eyecare Voucher Scheme
- Eligibility to join NUS Extra saving you £££'s on a range of goods and services
- Relocation allowance
- Security of knowing you are joining an organisation whose sponsor has been promoting education for more than 180 years!

"As headteachers, we rely heavily on the expertise of the finance provision at the Trust. We know that our school business managers are fully supported, so that we can make sound financial decisions which are in the best interests of all of the children in the school and those who will join in the future".

Lee Dallinger, Headteacher, Kingsham Primary School, Chichester

Application Procedure

Applicants should **complete** an **Application Form** which can be downloaded from the Trust's website www.unicat.org.uk/find-job and return it to the address below **no later than 12 April 2021 at 9.00am**.

University of Chichester Academy Trust
HR Department
2.02 Arran House
Bognor Regis Campus
Upper Bognor Road
Bognor Regis. PO21 1HR
For the attn. of Mrs Louise Birch, HR Manager

T: 01243 793503

E: unicathr@chi.ac.uk

Pre-Application

CVs received will be reviewed based on the Job Profile and individuals who meet the criteria will be invited to complete a full application, but the Trust provides no guarantee that the application will be successful in the shortlist stage.

This step is optional and should not deter applicants from submitting an application.

Application Form Completion

When completing the application form, please refer to the Job Profile and particularly the Person Specification in the context of the accountabilities.

You should provide examples which evidence how you believe your knowledge and qualifications, skills, experience and personal attributes, either at work, or elsewhere, qualify you to undertake the duties and responsibilities set out in the Job Profile.

CV

You may submit your CV rather than detailing qualifications and previous employment in the application form. However, all other information requested should be contained within the application form.

If there are any dates unaccounted for you should detail the reasons in the relevant field on the application form.

Selection Procedure

The shortlist will be completed after the closing date and successful candidates will be invited to an assessment day on Monday, 19 April. Some candidates will then be invited to interview on Tuesday 20 April. The assessment day and interview will be held virtually.

Failure to send your application form to the above address may invalidate your application.

Receipt of Application

Applications are acknowledged (by email whenever possible) within three working days of receipt. If you do not receive an acknowledgement within this time, please email Louise Birch, HR Manager at l.birch@chi.ac.uk to advise immediately.

University of Chichester Academy Trust

Arran House
Upper Bognor Road
Bognor Regis
West Sussex
PO21 1HE

T: (01243) 793500
E: unicathr@chi.ac.uk
W: unicat.org.uk
T: @chiuniAcademies

If you would like to receive this information pack in an alternative format, please contact the Trust's HR Department.