



Shaw  
Education  
Trust



# Careers

at Shaw Education Trust



<b>Job Title:</b>	<b>Director of Finance</b>
<b>Grade:</b>	<b>14</b>
<b>SCP:</b>	<b>SCP 63-65</b>
<b>Conditions of Service:</b>	<b>Support Staff Contract</b>
<b>Responsible to:</b>	<b>Chief Financial Officer</b>
<b>LOCATION:</b>	<b>SET Head or Regional Office with travel to Academies within the Region where necessary</b>

## Job Purpose

Shaw Education Trust is a leading educational organisation dedicated to improving the lives of young people. Operating across multiple academies, we are committed to delivering excellence in education and ensuring every child has access to opportunities that unlock their potential.

As part of our strategic growth, we are seeking a dynamic and experienced Director of Finance to provide strategic leadership in shaping the Trust's financial strategy, enhancing operational efficiency, and supporting the delivery of world-class education.

The Director of Finance is a critical member of the Trust's senior leadership team and will be responsible for overseeing all aspects of financial management within the Multi-Academy Trust. This includes budgeting, financial forecasting, reporting, risk management, compliance with financial regulations, and strategic financial planning. The role demands a strategic thinker with strong financial expertise, excellent communication skills, and the ability to collaborate effectively with both internal and external stakeholders.

The post holder will also ensure that the Academies are in compliance with group policy (including the Finance Handbook, Management and Audit reports, Scheme of Delegation and any such other policies as stipulated by the SET Board) and will be expected to provide clear direction to Regional Academy Directors (RADs), Academy Principals, School and Central Finance teams and to support and challenge academies in all aspects of financial management, governance and administration.

### Key Responsibilities:

- Lead the development of the Trust's long-term financial strategy in alignment with its educational objectives and goals.
- Provide strategic financial advice and support to the CFO, CEO, Trustees, and Senior Leadership Team to ensure the financial health of the Trust.
- Lead the preparation of annual budgets and long-term financial forecasts in collaboration with the senior leadership team and Chief Financial Officer.
- Oversee the production of monthly management accounts for the Trust and individual academies, providing detailed variance analysis and key insights.
- Oversee the preparation of the academy's financial statements on behalf of the schools, aligning to the central accountancy team reports ensuring accuracy and compliance with UK GAAP, the Charities SORP, and the Department for Education Funding (DfE) regulations.
- Accountable for developing, maintaining and producing effective cash flow management processes to ensure liquidity and resilience.
- Maintain a robust financial reporting framework to ensure transparency and accountability in all financial matters.
- Lead the financial aspects of procurement, ensuring value for money and compliance with public sector procurement rules.

- Oversee payroll processing, ensuring timely and accurate payments and compliance with PAYE, pensions, and other statutory requirements.
- Complete and ensure timely submission of statutory reports, including financial returns to DfE/ESFA and other regulatory bodies.
- Oversee and quality assure the month end accounting processes and work collaboratively with the academy accountants to ensure timely and accurate month end data is provided.
- Ensure compliance with all relevant legislation, regulations, and funding requirements.
- Lead on the internal and external audits programmes, ensuring that all documentation is provided and any issues are addressed and provide reports to the Trustees board.
- Lead financial insight and analysis to inform strategic decision-making, particularly in relation to the financial viability of projects and initiatives.
- Analyse financial trends, operational efficiency, and cost-effectiveness to help the academy achieve financial stability.
- Develop and implement financial strategies that support long-term sustainability and growth, whilst managing efficient use of resources.
- Develop and implement internal controls and financial policies to safeguard assets and ensure financial integrity.
- Plan, forecast and advise Academies on data affecting the funding factors.
- Lead on the Integrated Curriculum Financial Planning (ICFP) process for academies, optimising the resources available whilst ensuring value for money.
- Ensure that Related Party Transactions by the schools are reported to the DfE following consultation with the Chief Financial Officer.
- Support a program of Financial internal scrutiny and quality assurance across the academies to ensure compliance with the Trusts regulatory requirements and internal policy and process.
- Use commercial and business acumen to carry out horizon scanning, leading change and recommending strategies to improve financial performance within the school.
- Take ownership of management's interventions to audit recommendations.
- Ensure schools comply with internal and external audit requests. Create action plans within the schools to address financial risks highlighted through the process.
- Provide analysis and deliver insight that links financial reports to school strategies on financial performance, regulatory compliance, and risk management.
- Responsibility for cost management to ensure financial sustainability. Implementing streamlined processes, cost-saving measures, and identify potential areas for revenue growth (e.g., through additional services, partnerships, or fundraising activities) to directly contribute to the academy's financial resilience.
- Present a high level of commercial expertise in assessing and mitigating financial risks, particularly in an environment where external funding can fluctuate. Ability to anticipate challenges such as changes in government funding, regulatory adjustments, or economic downturns and devising plans to mitigate their impact is key.
- Provide clear and effective communication with stakeholders, including school trustees, senior leadership, and external bodies, is essential. You will need to present complex financial information in a clear, accessible manner, ensuring transparency and building trust in financial decision-making processes.
- Accountable for supporting decision making in regards to procurement regulations to ensure robust financial transactions are in place across the trust academies.
- Advise on financial risks related to capital projects, investments, and other significant financial decisions.

## **Management**

- Provide strategic support to the Chief Financial Officer, Principals on all aspects of academy business management. Deputise for the CFO as required.
- Lead on advice and guidance to finance managers across the schools on all aspects of risk and control in financial and organisational processes and act as subject expert on key projects and tasks when required.
- Provide leadership, coaching, and training to finance teams within academies to foster a culture of financial accountability.
- Directly line manage the senior accountant, accountants, payroll lead and Senior Lead Regional Finance Partners.
- Manage all aspects of finance across the academies and support the Chief Financial Officer in their responsibilities.
- Line manage designated finance and payroll staff working collaboratively to ensure best value for money across the academies and provide effective support, guidance, challenge and information.
- Responsible for maintaining clear expectations, high standards of professionalism and collaboration to meet the academy improvement planning priorities.
- Advise the Principals in safeguarding and managing the assets of the academy, ensuring that the academy has an asset replacement plan that is being adhered to, including IT and infrastructure.

#### **New Academy responsibilities**

- Responsible for completing due diligence on potential new academies joining the Trust.
- Support operational leads to complete a robust due diligence process, identifying potential risks and how these could be mitigated.
- Ensure all financial aspects of opening new academies are completed including: ensuring appropriate contracts are transitioned / signed up for, setting up SET systems, and completing all other financial aspects relating to opening a new academy.
- Accountable for providing post-opening support to new academies, ensuring accounts, forecasts and reports are accurate and timely. This will also include reviewing all internal control documents to ensure they are complete and accurately reflect the control environment of the academy.
- Lead on the provision of training and support to new academy staff, principals and senior teams to ensure a welcoming and effective transition into our SET family.

#### **Support to School** (this list is not exhaustive and should reflect the ethos of the school)

- Promote and safeguard the welfare of children and young persons you are responsible for or come into contact with.
- 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.
- Ensure all pupils have equal access to opportunities to learn and develop.
- Appreciate and support the role of other professionals.
- Contribute to the overall ethos/work/aims of the school.
- Attend and participate in relevant meetings as required.
- Participate in training and other learning activities and performance development as required.
- Contribute to the achievement of the school's objectives.
- **Promote inclusion and acceptance of all pupils within the school.**
- Establish good working relationships with pupils, acting as a role model and setting high expectations.
- Be aware of, support and ensure equal opportunities for all.
- Assist with pupil needs as appropriate during the school day.

#### **Safeguarding**

- Take responsibility for promoting the safety and welfare of all pupils.
- Report all concerns to an appropriate person.
- Co-operate and work with relevant agencies to protect children.
- Ensure all statutory requirements are adhered to, including prevention.

***This job description is not prescriptive, nor necessarily a comprehensive definition of the position.***

***Notwithstanding the duties in this job description, you will be expected to undertake any other duties and tasks which are not specifically listed but are within the scope and remit of this post to ensure the effective delivery and development of the service.***

## Qualifications and Experience

### **Qualifications/Training (Essentials)**

- ACA, ACCA, CIMA, or equivalent qualified accountant
- Minimum 5 years in a Leadership role

### **Skills/experience (Essentials)**

- Significant experience in a senior lead finance role, ideally within an academy or educational support setting. (D)
- Leadership experience in the commercial sector to support traded services and growth. (D)
- In-depth knowledge of UK public sector financial regulations, academy funding, and ESFA/DfE requirements. (D)
- Proven working knowledge of accountancy practice within month end processes.
- In-depth knowledge of national funding formula and modelling for future forecasting.
- Strong understanding of accounting systems, financial reporting, and budget preparation.
- Excellent proficiency in Microsoft Excel and accounting software (e.g., PS Financials, Sage, or similar).
- Experience with financial analysis and forecasting, and a proactive approach to financial planning.
- Knowledge of charity accounting and compliance regulations (including Charities SORP).
- Evidence of further relevant, recent professional development
- Self-motivated, with a “can do” approach to problem solving and an ability to work autonomously using own initiative
- Ability to use and act on own initiative and work unsupervised
- Emotional resilience in working in a range of challenging situations
- Ability to solve problems at an operational level and identify creative solutions

### Codification of expected norms and behaviours

Leadership, of self and others		
Attitude	Aptitude	Functional Capability
<ul style="list-style-type: none"> <li>• Build relationships between yourself and the team, and between team members.</li> <li>• Unify not divide the team, promote a culture of respect.</li> <li>• Manage conflict well and pro-actively.</li> <li>• Embrace and welcome accountability of self, and for team.</li> <li>• Care for the well-being of your team/colleagues.</li> <li>• Support the retention of good staff by creating a positive culture around workforce development and team communities.</li> <li>• Ensure good communication amongst your team and the wider organisation as appropriate.</li> </ul>	<ul style="list-style-type: none"> <li>• Ensure effective workforce development and training for self and all, including coaching and mentoring.</li> <li>• Spot and nurture talent – in yourself and in others.</li> <li>• Positively engage in development opportunities and aptitude development.</li> </ul>	<ul style="list-style-type: none"> <li>• Ensure clear roles and accountabilities for the team are well understood.</li> <li>• Develop and promote mutual accountability between colleagues in the team. Deploy staff and resources effectively across the team. Manage the workload of self and team.</li> <li>• Know your team(s)/colleagues well.</li> </ul>
Model our values and behaviours		
Attitude	Aptitude	Functional Capability

<ul style="list-style-type: none"> <li>• Build trust within your teams and across the Trust.</li> <li>• Create and contribute to a psychologically safe environment so staff can work and flourish within your team and across the Trust.</li> <li>• Value compassion</li> <li>• Encourage a can-do approach personally and across your team.</li> <li>• Positively challenge poor behaviour and call it out.</li> </ul>	<ul style="list-style-type: none"> <li>• Be self-reflective on your own strengths and be proactive in seeking support (via colleagues, reading or CPD) to understand any areas for improvement and ensure your development in these.</li> </ul>	<ul style="list-style-type: none"> <li>• Display professional credibility to team, peers, and trustees.</li> </ul>
<ul style="list-style-type: none"> <li>• Be highly and consistently visible across the organisation and within your team.</li> <li>• Demonstrate a consistent approach and calmness.</li> </ul>		

**Motivate and inspire**

<b>Attitude</b>	<b>Aptitude</b>	<b>Functional Capability</b>
<ul style="list-style-type: none"> <li>• Celebrate and acknowledge success of self and others.</li> <li>• Show and demonstrate the value of others – create an abundance culture where all can be successful without threat or competition.</li> <li>• Demonstrate drive and ambition for self, team and Trust.</li> </ul>	<ul style="list-style-type: none"> <li>• Engage in wider networking, development opportunities and/or reading to gain inspiration and personal motivation.</li> <li>• Understand and share your ‘why’ – and revisit it regularly.</li> </ul>	<ul style="list-style-type: none"> <li>• Communicate a precise and clear vision.</li> <li>• Set the journey ahead which is understood by all.</li> <li>• Evidence sharp goal setting and achievement.</li> <li>• Ensure errors, oversights and mistakes are rare.</li> </ul>

**Reflection**

<b>Attitude</b>	<b>Aptitude</b>	<b>Functional Capability</b>
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<ul style="list-style-type: none"> <li>• Demonstrate transparency and integrity within team and across the Trust.</li> <li>• Accept responsibility and be vulnerable, avoid a blame culture.</li> </ul>	<ul style="list-style-type: none"> <li>• Take time to know yourself and engage in self-reflection and learning.</li> <li>• Ask thoughtful questions and seek the truth.</li> <li>• Give and accept feedback.</li> </ul>	<ul style="list-style-type: none"> <li>• Encourage your team to reflect on efficiency and effectiveness, striving to gain a constantly improving approach.</li> </ul>
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**Secure accountability by giving tools to succeed by...**

<b>Attitude</b>	<b>Aptitude</b>	<b>Functional Capability</b>
<ul style="list-style-type: none"> <li>• Giving generously with your time.</li> <li>• Ensuring 1:1 meetings are useful and effective in driving improvement.</li> <li>• Providing support and removing barriers to success.</li> <li>• Be true to your word, if you say you will do something, do it.</li> </ul>	<ul style="list-style-type: none"> <li>• Have high expectations of yourself and others, seek out best practice.</li> </ul>	<ul style="list-style-type: none"> <li>• Ensuring absolute clarity in terms of expectation and 'the ask'.</li> <li>• Allocating resources effectively to support KPI delivery. Be willing and able to have challenging conversations.</li> </ul>

**In addition to candidates' ability to perform the duties of the post, the interview will explore issues relating to safeguarding and promoting the welfare of children including:**

- Motivation to work with children and young people
- Ability to form and maintain appropriate relationships and personal boundaries with children and young people
- Attitudes to the use of authority and maintaining discipline
- The post holder will be required to have an enhanced DBS check



If a disabled person meets the criteria indicated by the 'Two Ticks' symbol and provides evidence of this on their application form they will be guaranteed an interview.

**SW 14.02.2025**

***Note This job description and person specification conforms to the Shaw Education Trust job evaluation standards and cannot be amended/updated without SET HR approval.***



