



**St Ralph  
Sherwin**  
Catholic Multi Academy Trust

## St Ralph Sherwin Catholic Multi Academy Trust

### Job Description

### Finance Director

<b>Reporting to:</b>	The Chief Executive Officer
<b>Responsible for:</b>	Strategic Management of Finance across the Trust
<b>Liaising with:</b>	The Trust Board, sub-committees of the Trust Board, the CEO, HR Director, Head Teachers, members of the Executive team, other colleagues, NRCDES, Governors, contractors and suppliers
<b>Grade/Salary:</b>	Band E4 (Scale point 71-77) £85,286 - £96,814
<b>Hours of work:</b>	37 hours per week (additional hours may be required to meet the requirements of the role)

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#### Core Purpose:

- To support the CEO and the Board of Directors of St Ralph Sherwin Catholic Multi Academy Trust (hereafter referred to as the 'Trust') in the development and effective delivery of financial processes and systems across the Trust.
- Responsibility to ensure that the Trust and the individual academies within the Trust, operate good financial governance and are compliant with the requirements of the Academy Trust Handbook, the Trust's own financial regulations, policy and procedures and/or other statutory and regulatory requirements.

#### Specific areas of responsibility and key tasks:

##### *Financial Management*

- To lead the development and implementation of robust financial policies and procedures across the Trust and ensure compliance with relevant legislation and good governance guidelines.
- To provide strategic advice, leadership and support to the Trust on all aspects of finance and business management.
- To ensure that good financial governance operates in line with the requirements of the Academy Trust Handbook, the Trust's own financial regulations, policy and procedures and/or other statutory and regulatory requirements.



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- To have overall responsibility for accounting policies, financial regulations and ensure financial systems operate with sound financial controls, which minimise the risk of fraudulent activity.
- To have overall responsibility for the Trust's annual budget, taking the lead role in coordinating the annual budget setting processes for all Trust academies.
- To prepare the year end statutory accounts and year end audit of the Trust according to DfE and HMRC guidelines.
- To monitor the financial performance of each academy within the Trust.
- To present quarterly and annual financial reports to the Board of Directors and CEO.
- To manage all funding agreements with new and existing academies to ensure compliance with Education and Skills Funding Agency requirements.
- To conduct comprehensive financial due diligence on any school considering joining the Trust and report to the Board of Directors any associated risks.
- To take responsibility for the speedy and effective introduction of relevant financial systems and processes in academies joining the Trust.
- To develop long-term financial plans for the Trust to ensure financial viability.
- To maximise income generation opportunities within the Trust.
- To research and complete funding bids to external bodies including government departments to maximise the Trust's resources.
- To ensure that any funds received from successful bids are spent appropriately and within timescales.
- To ensure that tax obligations are discharged correctly and effectively.

### **Leadership**

- To build and develop a high performing finance team, ensuring succession planning is in place at all levels.
- Line management of other Executive team members as appropriate.
- To ensure that staff within the academies are supported, developed and equipped with the resources required to deliver effective finance across the Trust, in line with Trust policies.
- To provide induction support to staff within new academies.



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### ***Audit and Compliance***

- To be responsible for liaising on finance matters with the auditors and the provider of financial and commercial advice to the Board.
- To prepare individual academies and the Trust as a whole for any internal or external audits.
- To liaise with auditors and facilitate all audit arrangements.
- To implement any audit requirements.
- To keep abreast of all developments and legislation surrounding payroll, pensions and benefits and ensure all necessary changes are implemented and adhered to with the Trust.
- To monitor closely the spending of plans of individual academies by holding individual managers to account and making any subsequent recommendations to the Board.
- Ensure that financial standards are complied with, through monitoring and compliance assessment, in line with current legislation and the requirements of the Education and Skills Funding Agency guidelines and the Academy Trust Handbook.

### ***Procurement***

- To manage the effective purchasing and procurement of services for the Trust and negotiate, manage and monitor contracts, tenders and agreements for the provision of support services, including payroll, facilities management, ICT and insurance, all to be in line with DfE guidance.
- To ensure the Trust receives the best possible products at the best possible price in the required time frame.

### ***Capital and Asset Management***

- To identify all available sources of capital grants.
- To oversee the preparation of capital grants and bids.
- To ensure the correct valuation of assets, including buildings and land.
- To prepare an annual capital plan and strategy for capital replacement including consideration of whole-life costs and scheduled replacement.
- In accordance with the Academy Trust Handbook, to ensure that appropriate risk management processes are in place and monitoring is reported back to the Trust.



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### **Payroll Operations**

- To obtain monthly payroll reports from the payroll service provider and distribute them to the relevant personnel.
- To ensure that all salary payments are correct in accordance with budgets.
- To ensure the annual end of year certificate for the teachers' pension scheme is completed and certified by the auditors in an accurate and timely manner.

### **Additional Duties**

- To attend meetings as required.
- To take action to improve outcomes for young people and to support all academies in the Trust to be outstanding.

*St Ralph Sherwin Catholic Multi Academy Trust is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment. This post is subject to satisfactory references, which will be requested, prior to interview, an enhanced Disclosure and Barring Service (DBS) check, medical check, evidence of qualifications plus verification of the right to work in the UK.*

*The Trust will endeavour to make any necessary reasonable adjustments to the job and the working environment to enable access to employment opportunities for disabled job applicants or continued employment for any employee who develops a disabling condition.*

*Whilst every effort has been made to outline the key duties and responsibilities of the role, it is not an exhaustive list. The duties and responsibilities of the role may vary from time to time, commensurate with and without changing the general character of the duties or the level of responsibility entailed, and would not in itself justify a reconsideration of the grading of the post.*



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### Person Specification

#### Finance Director

A Training and Qualifications	Essential	Desirable	How assessed
Professional qualification in finance or accounting	Y		A
Current membership of a relevant professional body (e.g. CIMA, ACCA)	Y		A
Educated to A Level or above, including a minimum of GCSE (or equivalent) grade C in Mathematics and English	Y		A
Educated to degree level 2:1 or above in a relevant subject or equivalent professional qualification		Y	A
Commitment to ongoing professional development		Y	A/I

B Experience	Essential	Desirable	How assessed
A minimum of five years' post-qualification experience within a finance function	Y		A
Experience of working in a school/educational setting in a financial management role or equivalent		Y	A
Experience of managing large and complex budgets	Y		A/I
Solid understanding of regulatory frameworks	Y		I
Experience of producing and presenting complex management accounts	Y		A/I
Experience in management of fixed assets and capital accounting	Y		A/I
Experience of developing and operating financial systems and procedures, including audit compliance controls	Y		A/I
Experience of working in a Multi Academy Trust financial role		Y	A
Experience of managing a finance team	Y		A



<b>C Professional Knowledge and Skills</b>	<b>Essential</b>	<b>Desirable</b>	<b>How assessed</b>
Evidence of continuing professional development	Y		A/I
Evidence of providing training and development opportunities to other staff		Y	I
Ability to manage a varied and complex workload as well as delivering to timescale(s)	Y		I
Ability to produce complex financial information in a logical, user-friendly way	Y		I
Strong ICT skills	Y		A/I
Excellent verbal and written communication skills	Y		A/I
Excellent planning and organisation skills	Y		A/I
Knowledge of current legislation affecting taxation, payroll, pensions and VAT		Y	A/I
Understanding of the funding and financial management arrangements and reporting requirements for academies		Y	A/I

<b>D Personal Attributes</b>	<b>Essential</b>	<b>Desirable</b>	<b>How assessed</b>
Willingness to support Catholic life in schools	Y		I
Able to command credibility and respect from all members of school communities	Y		I
Emotional resilience	Y		I
The ability to self-evaluate and reflect	Y		I
The ability to adapt to changing circumstances and new ideas	Y		I
Attention to detail	Y		A/I
Excellent numerical skills	Y		I
Integrity and commitment to good governance	Y		I
Ability to be respectful and promote equality of opportunity and diversity	Y		I

<b>E Safeguarding</b>	<b>Essential</b>	<b>Desirable</b>	<b>How assessed</b>
Understanding of responsibilities of the Trust and schools in ensuring compliance with all relevant legislation	Y		A/I



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**Key:**

A – Application form

I – Interview / assessment