



THE DIOCESE
OF GLOUCESTER
ACADEMIES TRUST
unlocking potential



Application Pack for:

Head of Finance for
The Diocese of Gloucester
Academies Trust



MESSAGE FROM THE CHIEF EXECUTIVE

Dear Candidate,

Thank you for your interest in the post of Head of Finance. The role is part of the Executive Leadership Team of the Trust, along with the Deputy CEO, the Head of Business and Finance and the Head of Governance and People, and is a key role within the organisation.

Originally established in 2012 as one of the first Diocesan Multi-Academy Trusts, The Diocese of Gloucester Academies Trust is now recognised as a successful and growing Trust. There are currently 24 primary schools within the Trust family, including 22 church schools and two community schools.

We are looking for someone to take the Trust to the next phase of its financial development, ensuring that our resources are used to the very best effect for the children we serve. We are looking for a leader that will inspire, motivate and lead those with financial responsibilities within the organisation, and who is diligent, organised and can communicate effectively.

I hope the background information enclosed, along with the job description and person specification will provide you with a helpful context for this role. You may also find our website a useful source of information - **www.dgat.org.uk**

This post offers an exciting opportunity for an outstanding, confident and experienced finance professional. If you would like an informal chat to inform your decision about applying for the role I would be pleased to hear from you. I'm sure you will find that we have much to offer. Details of how to contact me can be found on page four of this pack.

Yours sincerely



R^howie

Rachel Howie
Chief Executive



THE VISION OF THE DIOCESE OF GLOUCESTER ACADEMIES TRUST

Our vision is to enable all to flourish

Our vision is to be:

- * Authentically Christian.
- * Boldly passionate about excellence in learning.
- * Relentlessly driven in our aspiration for everyone.

Our vision is rooted in our Christian foundation and our belief that all within our family should experience life in all its fullness.

Our core principles

These underpin all we do and all the decisions we take.

- * We aspire to be the best we can be in an ever-changing environment - providing opportunities for all to flourish.
- * Within our DGAT family we cherish everyone as individuals; appreciating and celebrating diversity.
- * We act with integrity; we are open to challenge and we are reflective about our practice.
- * We treat everyone with dignity and respect.
- * Through collaboration, in a nurturing community, we grow, learn and achieve.

Serving the Common Good and the diocesan LIFE Together vision

As a Trust set up by the Diocese of Gloucester Board of Education, all we do is steeped in both the National Church of England Vision for Education: Deeply Christian – Serving the Common Good and the diocesan LIFE vision.

Deeply Christian - Serving the Common Good is permeated by four core elements WISDOM, HOPE, COMMUNITY, DIGNITY. Our work is rooted in these elements and in all our schools these will be evidenced through our decision making, our relationships, our communications and our learning.

Together the Trust Board, central staff and our school communities are united in enabling children and staff to grow, flourish and succeed in an environment of educational excellence.

Enjoyment

Passion

Inspiration

Creativity



SEEKING AN INSPIRATIONAL LEADER

We are seeking to appoint a Head of Finance, acting as the CFO, for this successful and growing academy trust. This is an exciting opportunity to make a significant contribution to the work of the Trust, joining a skilled, dedicated and supportive central team to enable the children in our schools to flourish and succeed.

The successful candidate will be responsible for strategically planning, implementing, reviewing and reporting on all aspects of finance across the Trust. This role drives, both strategically and operationally, the support, advice and guidance that enables the schools to succeed and ensures the consistent delivery of the Trust's principles and values. It is a key position within the organisation.

The central finance team would like a leader who:

- * Will build on the strengths of the team and support them to flourish in their roles
- * Is a strategic thinker who can horizon scan and plan ahead
- * Is an effective leader of change
- * Can support them to problem solve as individuals and as a team
- * Provides consistent and high-quality leadership
- * Can manage priorities calmly and pragmatically
- * Is an active listener who responds proactively

The successful applicant will be based in the DGAT offices at 3 College Green, Gloucester. The post is offered at a salary of £64,375 - £77,983 and is a full time, all year-round post. It is required as soon as possible.

Further details and an application form can be downloaded from the vacancy area of the Trust's website www.dgat.org.uk. If you would like an informal conversation with Rachel Howie, Chief Executive Officer about the role please contact Sharon Sharples, Executive Assistant – ssharples@cen.dgat.org.uk

The closing date for applications is 5pm on 31 October.

Interviews will be held in the week beginning 11 November.



OUR FINANCE OFFER TO SCHOOL

The Trust provides a wide range of support to its family of schools. The financial offer is outlined below:

- * Provision of a central finance function
- * Access to a central finance team via telephone and email
- * Statutory ESFA returns completed for each school including
 - Budget return (BFR, combined budget and 3-year forecast return)
 - Annual rates reclaim
 - Annual accounts return (AAR)
- * Completion and submission of all financial reports required by the DfE
- * Maintenance of the capital asset register
- * VAT returns to HMRC
- * Challenge and support to headteachers and local governing boards regarding establishing long term (3-5 year) financial forecasts
- * Bespoke finance package, including all annual finance software licences and budget setting software
- * Ongoing training and support on all financial software, procedures and reporting
- * Regular school business manager and finance staff forum
- * Practical support with budget preparation and management, including monthly budget meetings with the headteacher
- * Regular updates and briefings on all financial and business-related matters, including, for example, changes to national pay scales and National Insurance rates
- * Management of all month end procedures and submissions including VAT returns
- * Preparation of monthly reports to headteacher, local governing board and the Trust
- * Administration of the Local Government Pension Scheme and Teachers' Pension Scheme, including completing annual certificates and audit administration
- * Applications for additional grants and funding, as opportunities arise
- * Preparation and filing of annual Statutory Accounts for the Trust
- * Regularity audits including liaising with internal and external auditors
- * Preparation and submission of the Statement of Recommended Practice (SORP) – charity accounts
- * Administration for all actuarial valuations
- * Compliance checks on all financial and business functions
- * Setting up and maintaining all bank accounts
- * Supplier credential checks
- * Administration and payment of the apprenticeship levy



JOB DESCRIPTION AND PERSON SPECIFICATION

Job Title: Head of Finance

Responsible to: The Directors of Diocese of Gloucester Academies Trust (DGAT)

Reporting to: Chief Executive Officer

Responsible for: The finance functions of the Trust
Line managing finance manager, finance systems lead and finance assistant

Contract type: Full time

OVERALL PURPOSE OF THIS POST

The overall purpose of this post is to provide strategic leadership on all aspects of the Trust's finances in order to

- * achieve outstanding educational outcomes for pupils in its schools
- * ensure compliance with the Academy Trust Handbook
- * plan for financial sustainability for the organisation

MAIN RESPONSIBILITIES

General

- * To fulfil the role of Chief Financial Officer for the Trust ensuring the presentation of coherent, understandable and accurate financial information to a range of audiences including CEO, Directors, auditors, the Department for Education (DfE) and the Education Skills and Funding Agency (ESFA).
- * To ensure the financial sustainability of the Trust.
- * Ensure that the Trust's resources are managed efficiently, ethically and professionally.
- * Maintain a secure overview of the management of all financial issues within each of the Trust's schools, providing financial assistance to the Chief Executive Officer (CEO) and Trust Board.
- * To ensure compliance with all relevant financial standards and procedures including Funding Agreements, Academy Trust Handbook, public sector guidance and internal control frameworks including the Trust's finance policy.
- * Keep the CEO and the board up-to-date with the latest funding changes, company law, statutory guidance and all matters relating to the financial strategy of the MAT.
- * Uphold good governance and ethical behaviour, including good accounting practices and internal control systems.
- * Develop and implement strategies for maximising the Trust's current finances.
- * Be responsible for the strategic development of finance systems, reporting and training across the Trust.

- * To support the CEO in planning strategically for the future.
- * Model the financial impact of any proposed operating models, particularly those as a result of expansion or changes in funding.
- * To advise of risks associated with financial activities of the Trust.
- * To liaise and respond to financial queries from the external bodies, auditors, local governors, staff and other agents on behalf of the Trusts' staff.
- * To ensure financial information is accurately kept up to date and monitored in accordance with procedure.
- * Promote financial awareness throughout the Trust.
- * In collaboration with the Head of Business and Operations address high spend areas by developing a trust wide procurement strategy to look at reducing costs at school level.
- * To work with the Head of Business and Operations to ensure a comprehensive fixed asset register is in place which meets external audit requirements.
- * To be responsible for benchmarking financial data within and beyond the Trust.
- * To represent the Trust with external agencies.
- * To identify and secure any additional funding streams relevant to the work of the Trust.
- * To contribute to centralised training, forums and e-bulletins.
- * Prepare financial appraisals of new projects.

Statutory compliance

- * To be responsible for the initiation and strategic leadership of audit and preparation of year end accounts, liaising with external auditors as required in relation to the timely and accurate provision of information and the scheduling of activities.
- * To be responsible for the timely completion of all other statutory and ESFA returns.
- * To oversee the preparation and submission of the necessary documentation for the recovery of VAT.

Systems, Controls and Reporting

- * To oversee the maintenance and updating, as appropriate, Trust documentation e.g. financial policies.
- * Co-ordinate the use of the computer based financial and management accounting system and budgeting tool for the Trust and each school to ensure effectiveness, efficiency and accuracy.
- * Ensure compliance with approved financial procedures and further develop financial controls.
- * Manage the central accounting role, ensuring that efficient income and payroll controls are in place and adhered to.
- * Maintain the financial elements of the Trust's risk register.
- * To manage project cost tracking, including the provision of regular and ad hoc reports.
- * To work alongside the CEO and appropriate Trust Board committees to determine key targets for budget setting and spending levels for all academies within the Trust.
- * Maintain appropriate and accurate financial records.
- * To ensure month end procedures, systems and process are timely, effective and efficient ensuring an effective system of variance analysis is in place.
- * To authorise BACS payments for schools and the central office, as appropriate.

- * To ensure that financial due diligence is completed for academy conversions and sponsorships and make recommendations to the CEO.
- * Develop and implement financial policies and procedures across the Trust in order to streamline functions and ensure efficiency including the use of financial software.
- * Recommend any improvements to systems and practices.
- * To prepare monthly management accounts of the Trust, for submission to the Audit, Risk and Finance Committee, investigating any material variances and reporting the position to the CEO, monitoring the financial health of academies within the Trust.
- * Contribute to the annual report and prepare the consolidated financial statements in the specified format for auditing by external auditors.
- * Ensure all forms and returns required by the ESFA are prepared and submitted in the specified format and filed before the deadline.

Line management

- * Provide high quality financial knowledge to those with financial responsibility in all aspects of finance.
- * To direct and oversee the work of the central finance team.

Other Responsibilities

- * To support the overall Christian ethos of the Trust.
- * To be aware of and comply with Trust policies and procedures reporting all concerns to the CEO.
- * To operate always as a lead professional for the Trust, modelling professional behaviour demonstrating high expectation of self and others.
- * Participate in appraisal arrangements and undertake training and CPD where appropriate.

The current main duties and responsibilities of this post are outlined in this job description. The list is not intended to be exhaustive. The need for flexibility, shared accountability and team working is required. The post-holder is expected to carry out any other related duties that are within the employee's skills and abilities, commensurate with the post and whenever reasonably instructed.

PERSON SPECIFICATION

	ESSENTIAL	DESIRABLE
Qualifications and knowledge	<p>The successful candidate will:</p> <ul style="list-style-type: none"> • Hold a degree or equivalent qualification in a finance related discipline • Be a qualified accountant 	<ul style="list-style-type: none"> • Chartered or Certified Accountant
Experience	<p>The successful candidate will have experience of:</p> <ul style="list-style-type: none"> • Working at a senior level with financial management systems • Successfully leading and managing budgets • Leading and managing high performing teams • Designing and implementing robust financial management processes and controls • Generating income and preparing bids • Providing high quality line management • Leading and managing change across multiple stakeholder groups 	<ul style="list-style-type: none"> • Experience of working in an educational setting • Understanding of the financial requirements of an academy trust as set out in the Academy Trust Handbook • Experience of obtaining additional funding • Experience of working with external auditors and agencies • Managing and working in an organisation which operates across multiple sites • Experience of using <ul style="list-style-type: none"> - HOGE - IMP - Dimensions/Access
Knowledge and Skills	<p>The successful candidate will have:</p> <ul style="list-style-type: none"> • Up-to-date knowledge of accountancy and professional codes of practice • Advanced knowledge of statutory requirements and funding strategies regarding the education sector • Proven awareness and respect for the highly sensitive status of information and its confidentiality • The confidence to challenge opposing views by presenting robust arguments and reasons for the contrary view • Excellent written and verbal communication skills • Ability to interpret complex financial information and statute, and devise policies and procedures in light of these 	<ul style="list-style-type: none"> • An ability to motivate colleagues • An ability to identify commercial opportunities to maximise income

Continued overleaf

ESSENTIAL

DESIRABLE

Knowledge and Skills (continued)

- Experience of successfully managing projects
- Proven experience of effectively lead a team
- An understanding of the principles and practice of risk management
- The ability to efficiently collate and analyse data with the proven ability to present to a diverse audience
- A high level of digital literacy and knowledge

Personal Qualities

The successful candidate will have:

- Excellent analytical and problem-solving skills
- Excellent time management and organisational skills with attention to detail
- High expectations of self and professional standards
- The ability to develop and maintain successful working relationships with other colleagues
- The ability to work collaboratively with the executive leadership team, finance team, wider central team, our schools and external stakeholders
- The skills to manage priorities calmly and pragmatically
- Proven ability to be logical and process driven
- Effective verbal and written communication skills
- A commitment to developing and empowering the central finance team
- A clear and confident decision- maker
- Exceptional active listening skills
- High levels of drive, energy and integrity

The successful candidate will be:

- Able to plan ahead and take control of situations to support the finance team to deliver strategic priorities
- Able to work flexibly, attending and contributing towards meetings and training outside of their specified work hours
- Friendly and approachable
- Capable of handling a demanding workload and be able to successfully prioritise work

Additional requirements

- This post is subject to a DBS check
- Excellent and unequivocal references
- Full driving license
- This post is subject to a three-month probationary period



For any queries please contact: Sharon Sharples, Executive Assistant – ssharples@cen.dgat.org.uk

Closing date for applications: 5pm 31 October 2024

Interviews: Week beginning 11 November 2024

The Diocese of Gloucester Academies Trust is committed to safeguarding and promoting the welfare of children and young people and expects all staff to share this commitment. An enhanced DBS check is required for the successful candidate.

WE ARE WORKING FOR EQUALITY IN EMPLOYMENT



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Registered Office: 3 College Green, Gloucester, GL1 2LR.

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