



Recruitment Pack

**Head of Finance**





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# Welcome from Katy Cox

## Catholic Senior Executive Leader

Dear Applicant

Thank you for your interest in joining Romero CAT's central team. I hope you will find the information in the application pack helpful.

As the new CEO of Romero CAT, I am delighted to begin expanding the central team in order to deliver the best education and best service to our schools, children, staff and their communities. If successful, you will be joining the trust at an exciting time of change and growth. It is my aim to strengthen and broaden the services and capacity at the centre to meet the challenging demands ahead of us. This post has been designed to contribute to this aim.

At Romero CAT, our values underpin everything we do: Faith, Service, Aspiration and Collaboration. The successful candidate will be in full alignment with our vision and values. You can find more information on our trust website.

We look forward to receiving your application.

Yours faithfully,

Katy Cox

CEO/CSEL

# Welcome from Angela Ager

## Chair of the Board of Directors

Dear Applicant

Thank you for your interest in the post at Romero Catholic Academy Trust.

What is distinctive about the Romero Catholic Academy Trust? As a Catholic Academy Trust, our first duty is to maintain and develop our schools as living faith communities inspired by the gospel.

Our Trust has grown from the six schools who originally joined Romero Catholic Academy Trust to sixteen schools. Developing strong relationships and local partnerships between our schools has been an essential driver to this growth.

Our Catholic Senior Executive Leader and central team ensure that the priorities and perspectives of each school can be heard within our Trust. Our schools continue to further increase collaborative approaches where they work together for the benefit of their communities and the Trust as a whole. Our directors value strong relationships with the local governing bodies of the individual schools.

It is an exciting time to join the Trust, over the next few years, the Trust will quickly grow to include all the schools in the Trusteeship of Salford Diocese in Blackburn with Darwen, Calderdale and Lancashire. We will ensure they all provide an exceptional Catholic education for our children.

Yours faithfully

Angela Ager (Chair of Directors)



# Our Values



Romero Catholic Academy Trust is a family of Catholic schools serving the needs of children and young people in the Diocese of Salford, covering the areas of Lancashire, Blackburn with Darwen and Calderdale. To achieve this, we will uphold four key values:

## **Faith: To nurture our belief in God.**

- Inspired by the vision of Bishop John, we will provide an authentic passing-on of our Catholic faith.
- Our schools will be nurtured by the Word of God.
- Our pupils will come to an understanding of what it means to be loved by God and the responsibilities that come from loving God.
- Our schools are worshipping communities characterised by vibrant liturgy and prayer.

## **Service: To live out the responsibilities of our faith by serving others.**

- We will always act in the service of the pupils in our care.
- In our schools we will educate our children to be the next generation of the stewards of God's creation.
- We embrace Catholic social teaching and work for the Common Good with a preferential option for the poor.
- We are outward facing, acknowledge our place in the wider educational system and accept our civic responsibility.

## **Aspiration: To aspire to fulfil the potential of each individual, created uniquely in the image of God.**

- We will work to fulfil the potential of each member of our community by providing an education that develops the whole person, including high quality Religious Education.
- Our schools will have a relentless focus on achievement. The quality of education in our schools will be 'at least as academically distinguished as that in the other schools of the area.' (Can. 806.2)
- Every member of our community will be provided with the knowledge, skills and attitudes needed to succeed in school and in the next stage of their lives.
- Through high quality and relevant continuing professional development, we will invest in our staff.
- Decision making will weigh up the Common Good and be made in a timely way.
- We will always focus on the solution to a problem.

## **Collaboration: To work collaboratively; sharing and fostering the strengths and expertise of all.**

- A spirit of solidarity leads us to accept a shared responsibility for all.
- We recognise the concept of subsidiarity; that decisions will be made as locally as possible.
- Improvements across our family of schools will be secured by utilising the skills and experience in the trust.
- Wherever possible, we will take care to involve and inform people in decision making.
- We believe in the importance of open, honest and positive communication.

# Saint Oscar Romero

Our Catholic Academy Trust is named after Saint Oscar Romero and his values as a great and inspirational teacher and as a protector of all.

Saint Oscar Romero stood out for his unwavering commitment to living out the Gospel, to providing a witness to the love of God in the face of violence. He was the Archbishop of San Salvador and he was murdered for criticising the government that kept people very poor. He shows us that we must see God in all people and work together to build God's kingdom of mercy, justice and love on earth.

Today, we can make a renewed commitment to follow in the example of our heroes of our faith to live a life faithful to Jesus. To turn our attention away from possessions and focus on the call to holiness.

## The Romero Prayer

It helps, now and then, to step back and take the long view.

The Kingdom is not only beyond our efforts; it is even beyond our vision.

We accomplish in our lifetime only a fraction of the magnificent enterprise that is God's work.

Nothing we do is complete, which is another way of saying that the kingdom always lies beyond us.

No statement says all that could be said. No prayer fully expresses our faith. No confession brings perfection. No pastoral visit brings wholeness. No program accomplishes the church's mission. No set of goals and objectives includes everything.

This is what we are about.

We plant the seeds that one day will grow. We water the seeds already planted, knowing that they hold future promise. We lay foundations that will need further development. We provide yeast that produces effects far beyond our capabilities.

We cannot do everything and there is a sense of liberation in realizing that. This enables us to do something and to do it well. It may be incomplete, but it is a beginning, a step along the way, an opportunity for the Lord's grace to enter and do the rest. We may never see the end results, but that is the difference between the master builder and the worker.

We are workers, not master builders; ministers, not messiahs.

We are prophets of a future not our own.



# Job Advert

## Head of Finance

37 hours per week, full year

Grade 12, SCP 43 – 48 (£53,887 - £58,281)

Permanent

Responsible to: Chief Financial Officer

Main Location: Romero Central Office with travel to other sites

Required to commence as soon as possible

Romero Catholic Academy Trust (Diocese of Salford) is dedicated to providing an outstanding Catholic Education to our pupils. We are seeking to expand our central team and appoint an ambitious and enthusiastic Accountant to join our central team in a senior finance role. As a growing CAT, this is an exciting opportunity to work directly with the CFO and develop the finance strategy and business partnering services across the CAT.

The role is varied and includes working in the central team in a reporting and compliance role, supporting an existing portfolio of schools and being involved in due diligence and the on-boarding process for new schools joining Romero CAT as part of our growth strategy.

The role would be suitable for an experienced, qualified accountant who is already working within the education sector or is keen to move into an organisation and sector which makes a difference to the lives of children and young people.

The post holder will report directly to the CFO with accountability for oversight of the CATs financial processes and business services. If you feel you have the right skills and attributes we are looking for, then we will be delighted to hear from you.

**Full details and application forms are available from our website:**  
[www.romerocat.com](http://www.romerocat.com)

*We are committed to safeguarding and promoting the welfare of young people and expect all staff to share this commitment. The successful applicant will be subject to an Enhanced DBS check.*

<b>Closing date:</b>	<b>23<sup>rd</sup> June 2025 @ 12 noon</b>
<b>Shortlisting date:</b>	<b>27<sup>th</sup> June 2025</b>
<b>Interview date:</b>	<b>11<sup>th</sup> July 2025</b>



## Head of Finance

### Job Description

#### **Job Purpose**

Provide an effective, compliant and consistently high-quality financial management and reporting service for Romero CAT through implementation of robust, measurable systems and processes which maximise the use of resources and deliver best value.

Ensure that the existing portfolio of schools and new schools joining the CAT receive an efficient finance service to support school improvement.

This is an exciting new post and a senior post within our existing finance team, reporting directly to the CFO. The postholder will focus on supporting all schools within the current portfolio; new schools joining the CAT and assisting the CFO in delivering the finance strategy.

#### **Main Duties and Responsibilities:**

##### **Financial Control and Compliance**

- Review and moderate the monthly management accounts and year end forecasts for accuracy
- Support the CFO in consolidation of monthly management accounts, including balance sheet and cash flow forecast and reports for the Trust Board
- Monitor capital funding and expenditure, ensuring funds are appropriately reported and fixed assets are accurately accounted on a monthly basis
- Support the CFO in developing financial policies and procedures to ensure compliance with the Academy Trust Handbook
- Review processes regularly to ensure compliance and make recommendations for changes to improve processes particularly as the Trust grows and evolves
- Assist in the development of systems and controls, lead on projects to create more efficient processes as the Trust grows and evolves
- Complete and submit the monthly consolidated VAT return
- Ensure self-generated income is promptly invoiced, and manage the procedure for credit control of any outstanding debts
- Assist the CFO in preparing the year end schedules to inform statutory accounts preparation and liaise with the Trust auditors over the annual statutory audit
- Oversee the implementation of recommendations from the audit and internal scrutiny process
- Support the CFO with mandatory returns to DfE, adhering to the published timetable and reporting deadlines

##### **Financial Management and Reporting**

- Support the Trust Finance Managers with month end reporting, forecasting and scenario-planning
- Ensure a clear financial picture and timely management reports are provided to schools and attend meetings (where required) to present financial reports
- Provide guidance and awareness of financial matters and responsibilities, procedures and systems to school-based finance staff, highlighting improper practice and ensuring observance of legal requirements
- Support schools in preparing business cases where required, in line with the Trust Scheme of Delegation

- Support the CFO in developing training plans and CPD/training events for School Business Managers/Finance Managers

### **Budgeting and Planning**

- Support the CFO with the annual budgeting process, the annual financial statements and returns to the DfE
- Develop and communicate the budgeting timetable and ensure this is adhered to
- Ensure pupil number assumptions are valid and supported by robust data
- Work with the CFO to implement ICFP across all schools and ensure educational objectives are prioritised within budgets and budgets are linked to school improvement plans
- Assist the CFO with benchmarking data for the Trust including key financial and operational indicators
- Ensure LGBs and the Board of Directors receive accurate budgets for approval

### **Due Diligence and Academy Conversions**

- Work with new schools within the Romero footprint to carry out due diligence, understand systems and processes, create high level reports suitable for board scrutiny and highlight risks and opportunities
- Identify training needs within each school setting and develop plans to ensure a smooth on-boarding process for new schools
- Ensure an accurate budget is in place for new schools with budget assumptions aligned to those used across the Trust
- Liaise with Trust Central Team and third parties to ensure legal and mandatory aspects of academy conversions are carried out in a timely manner and any issues communicated clearly

### **Procurement and Contract Management**

- Assist the CFO in developing the Trust procurement and contract management strategy for Trust Board approval
- Assist in delivering the strategic procurement plan across the Trust to achieve maximum efficiencies and value for money
- Work alongside other Trust Central Team members to present supplier tender proposals for Trust Board approval
- Ensure the Trust is engaged and registered on the key frameworks required to deliver value for money
- Assist in establishing and managing the Trust procurement and contract management function as the Trust continues to grow
- Develop and maintain the Trust contract register and use this to identify areas that can achieve efficiencies

### **Line Management**

- Responsibility for line management of Trust Finance Managers along with maintaining effective working relationships with School Business Managers



### **Other Responsibilities**

- Take responsibility for promoting and safeguarding the welfare of all pupils
- Demonstrate commitment to the Equal Opportunities policy, work positively and inclusively with colleagues so that the Trust provides a workplace and delivers services that do not discriminate against people on the grounds of their age, gender, sexual orientation, marital status, race, religion, creed, colour, nationality, ethnic origin or disability
- Work flexibly in the interests of the service (this may include undertaking other duties provided that these are appropriate to the employee's background, skills and abilities or attending governing body meetings outside of normal working hours)
- Travel between different sites as required
- Participate in performance reviews at regular intervals in accordance with Trust-wide procedures
- Undertake training courses organised by the Trust where these will assist in the carrying out of the above duties
- Demonstrate consistently high standards of personal and professional conduct

### **Safeguarding**

- Romero CAT is committed to safeguarding and promoting the welfare of children and young people at all times. You will be responsible for promoting and safeguarding the welfare of all children with whom you come into contact, in accordance with the Trust's and the individual schools' safeguarding policies. The post holder is required to obtain a satisfactory Enhanced DBS

### **Additional supporting information – specific to this post**

This post does not require a faith commitment within the Roman Catholic Church however, candidates must be supportive of the ethos, vision and values of the Trust and not do anything to undermine the faith commitment of the Trust. In line with all staff within the Trust, they will be required to sign a Catholic Education Service Contract.

## Head of Finance

### Person Specification

Qualifications	Essential (E) Desirable (D)	Evidence Application (A) Interview (I) Certificate (C) Test (T) Reference (R)
<b>Qualifications and Training</b>		
Degree level or equivalent	E	A/C
CCAB qualified	E	A/C
Sector specific qualifications (DSBM/CIPFA)	D	A/C
Evidence of commitment to ongoing professional development	E	A/C
5 GCSEs, including Maths and English, Grade C or above (or equivalent)	E	A/C
<b>Knowledge and Experience</b>		
Financial planning, budget monitoring and reporting and procurement	E	A/I
Management of fixed assets, balance sheet reporting and capital budgets/funding	E	A/I
Ability to implement the principles of best value to maximise resources	E	A/I
Experience of delivering to deadlines and achieving set targets to a high standard	E	A/I
Experience of allocating and prioritising workload effectively to gain maximum productivity	E	A/I
Experience of managing a team, including professional development and performance	E	A/I
Strong IT skills, including Microsoft 365 product suite	E	A/I
Prior experience in a similar role	D	A
Experience of payroll procedures	E	A
Experience of supporting and advising senior leadership within a medium/large organisation	D	A/I

In-depth knowledge of the Procurement Act 2023 and the implications of non-compliance	D	A
Experience of public sector procurement and contract management	D	A
<b>Skills and Abilities</b>		
Excellent planning and organisational skills	E	A/I
Ability to work independently to organise own workload	E	A/I
Strong interpersonal skills	E	A/I
Highly motivated individual with an innovative approach and problem-solving attitude	E	A/I
Ability to demonstrate engaging and effective oral and written communication	E	A/I
Ability to use a variety of financial management systems	E	A/I
Understand the principles of, and ability to complete, curriculum led financial planning	D	A/I
Experience of PS Financials and IMP accounting software	D	A/I
Team player with an ability to maintain effective working relationships with a wide range of stakeholders	E	A/I
<b>Other</b>		
Commitment to safeguarding and protecting the welfare of children and young people	E	A/I
Commitment to equality and diversity	E	A
Commitment to health and safety	E	A
Commitment to continuous professional development	E	A/I
Full UK driving license and possess a vehicle to travel between academies	E	A
<b>Note: We will always consider your references before confirming a job offer in writing</b>		
<b>Prepared by:</b>	<b>HR Team</b>	<b>Date: June 2025</b>

## Equal Opportunities

We are committed to achieving equal opportunities in the way we deliver services to the community and in our employment arrangements. We expect all employees to understand and promote this policy in their work.

## Health and Safety

All employees have a responsibility for their own health and safety and that of others when carrying out their duties and must help us to apply our general statement of health and safety policy.

## Safeguarding Commitment

The Trust is committed to safeguarding and protecting the welfare of children and young people and expects all staff and volunteers to share this commitment. Any offer of employment will be subject to receipt of a satisfactory DBS Enhanced Disclosure. An enhanced DBS check and pre-occupational health check are an essential part of the selection and recruitment process.

## Attendance

Good attendance enhances the service delivered by the Trust, minimises staffing difficulties and ensures best value to the schools. It is essential that applicants for positions in the Trust can evidence a previous satisfactory attendance record/commitment to sustaining regular attendance at work.

## How to apply

If you would like to find out more about the position, please contact the HR Department on **01282 855500** or [careers@romerocat.com](mailto:careers@romerocat.com).

**Full details and application forms are available from our website:**  
[www.romerocat.com](http://www.romerocat.com)

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**Completed application forms, and associated documentation, should be returned to the HR department via e-mail: [careers@romerocat.com](mailto:careers@romerocat.com).**