



Recruitment Pack

**Head of Finance**



**Romero**  
Catholic Academy Trust



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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.

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)

*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.*

**Closing date:**

**Wednesday 23<sup>rd</sup> April 2025 @ 12 noon**

**Shortlisting date:**

**Friday 25<sup>th</sup> April 2025**

**Interview date:**

**Wednesday 30<sup>th</sup> April 2025**



# Head of Finance

## Job Description

### Job Purpose

Provide an effective, compliant and consistently high-quality financial management and reporting service for Romero CAT through the 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 the 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**

- Preparation of the monthly management accounts and year end forecasts for a portfolio of secondary and primary schools, using PS financials and IMP budgeting software
- Support the CFO in consolidation of monthly management accounts, including balance sheet and cash flow forecast and reports for Romero CAT Board of Directors
- Responsible for monitoring capital funding and expenditure across the CAT, ensuring that revenue and capital funds are appropriately reported and fixed assets are accurately accounted on a monthly basis;
- To support the CFO in developing financial policies and procedures to ensure compliance with the Academy Trust Handbook published by the DfE
- Reviewing the processes of finance staff, to ensure compliance and making recommendations for changes to improve processes
- Assist in the development of systems and controls leading on projects to create more efficient processes as the Trust grows
- Support the Trust Finance Managers in ensuring that funding, payroll and VAT returns are processed in a timely manner and correctly authorised
- To ensure all self-generated income due to the CAT is promptly invoiced, and manage the procedure for credit control of any outstanding debts
- To prepare Year End schedules to inform statutory accounts preparation and liaise with CAT auditors over the annual statutory audit
- To liaise with CAT internal auditors over internal reviews relating to finance
- To oversee the implementation of recommendations from the audit and internal scrutiny process
- To support with mandatory returns to DfE and ESFA, adhering to the published timetable and reporting deadlines

### **Business Partnering and Reporting**

- Support a portfolio of schools with month end reporting, forecasting and scenario-planning
- Liaise with Headteachers, School Business Managers and Local Governing Bodies to provide a clear financial picture for schools and timely management reports, this will include attendance at meetings and presenting financial outturns
- To review, monitor and advise budget holders regarding their budgets
- To provide guidance and awareness of financial matters and responsibilities, procedures and systems to staff, highlighting improper practice and ensuring observance of legal requirements
- Identify and evaluate opportunities for improving value for money
- To support schools in preparing business cases where required, in line with the CAT scheme of delegation
- Ensure contract databases are up to date to support with development of procurement strategy
- To attend regular CPD/training events with School Business Managers and support CFO in developing training plans where required

### **Budgeting and Planning**

- Support the CFO with the annual budgeting process, the annual financial statements and returns to the DfE and ESFA, adhering to reporting deadlines
- Ensure budget assumptions for 3-5 year plans are clear and robust and the budgeting timetable is clearly communicated and adhered to
- Ensure pupil number assumptions are valid and supported by robust data
- Work with the CFO to develop curriculum led financial planning across the CAT to ensure that educational objectives are prioritised within budgets and budgets are clearly linked to school improvement plans
- To assist with benchmarking data for the CAT including key financial and operational indicators
- To ensure that local governing bodies and the CAT Board of Directors receive accurate budgets for approval
- To ensure that budget returns to regulatory bodies are completed accurately and in accordance with published timescales

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

- Work with new schools within Romero CAT 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 school settings and develop plans to ensure a smooth on-boarding of new schools
- Ensure an accurate budget is in place for new schools with budget assumptions aligned to those used across the CAT
- Liaise with 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



### **Line Management**

- Senior member of finance team with responsibility for line management of finance managers and business partners as the CAT grows, along with maintaining effective working relationships with School Business Managers.

### **Other Responsibilities**

- Adhere to all CAT-wide policies and procedures
- Take responsibility for promoting and safeguarding the welfare of all pupils
- Demonstrate commitment to the Equal Opportunities Policy, to work positively and inclusively with colleagues so that the CAT 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 of Romero CAT as required;
- Actively participate in performance reviews at regular intervals in accordance with CAT-wide procedures;
- Undertake training courses organised by the CAT where these will assist in the carrying out of the above duties, develop skills which may be required to fulfil those duties in the future or are required to fulfil legal requirements;
- Demonstrate consistently high standards of personal and professional conduct.

### **Safeguarding**

- Draw attention to best practice in Romero CAT to support other schools and encourage links with local agencies that may deliver additional resources to the schools or families
- Assist with ensure that all schools comply with safer recruitment procedures and that induction includes a specific focus on safeguarding; ensure that Single Central Records are comprehensive and maintained by academies to current standards
- Romero CAT is committed to safeguarding and promoting the welfare of children and young persons 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 CAT's and the school's safeguarding policies. The post holder is required to obtain a satisfactory Enhanced Disclosure and Barring Service (DBS)

### **Equality, Diversity and Inclusion**

- Assist with ensuring that schools implement the equality, diversity and inclusion strategy ensuring that every learner in the CAT has a positive experience.
- Look outward to other education settings in seeking to ensure best practice is maintained in all Romero CAT schools and settings.
- To support, recruit, manage, develop and motivate a committed, effective and diverse workforce that understands its roles and enables and promotes high quality learning.
- To ensure the development of positive solutions to achieving diversity, dignity and equality in all aspects of service delivery and engagement with the broader community.

### **General**

- Actively contribute to and promote the overall ethos and values of each school and the wider CAT.
- Participate in training and other learning activities and performance development as required.
- Maintain consistently high standards of professional conduct, tact and diplomacy at all times in dealing with pupils, parents, staff and colleagues, external agencies and any other visitors to the school or Romero CAT.
- Maintain absolute confidentiality and exercise discretion with regard to staff/pupil information and the CAT's business at all times.
- Act as an ambassador for the Diocese, schools and the wider CAT within the local community and beyond, ensure that the ethos and values of Romero CAT are promoted and upheld at all times.
- Undertake any other reasonable tasks and responsibilities requested by Romero CAT Board or Directors of Education which fall within the scope of the post.

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

The above list is not exclusive or exhaustive, and Romero CAT may require the post holder to undertake duties commensurate with the level of the role. As part of your wider duties and responsibilities, you are required to promote and actively support Romero CAT's responsibilities towards safeguarding.

Safeguarding is about keeping people safe and protecting people from harm, neglect, abuse and injury. It is about creating safe places, being vigilant and doing something about any concerns you might have. It is not just about the very old and the very young, it is about everyone who may be vulnerable.

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)<br>Desirable (D) | Evidence<br>Application (A)<br>Interview (I)<br>Certificate (C)<br>Test (T)<br>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/I  |
| 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/I  |
| Experience of payroll procedures  | E                              | A/I  |
| Experience of supporting and advising senior leadership within a medium/large organisation  | D                              | A/I  |
| Experience of working in a multi-academy trust environment or within the charities sector   | D                              | A/I  |

| <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>RCAT HR Team</b> | <b>Date:</b> | <b>January 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:**

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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)**

DIOCESE OF  SALFORD

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Catholic Academy Trust