



# APPLICATION PACK



## CHIEF FINANCE OFFICER


Full time position.

Required for November 2024 or ASAP after this.

Competitive salary.

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 *Together we flourish.*



# PROSPER TOGETHER MULTI ACADEMY TRUST



We are currently four schools in the West Midlands who have come together to form Prosper Together Multi Academy Trust; we will become a five school MAT in the autumn term of 2024, by which time we will educate in excess of 2000 pupils. Currently, all of our schools are based in North Solihull and are in the primary phase. Our Trust was formed in March 2023 with a culture and an ethos that fosters the development of the whole child, championing the needs of all pupils, is community focused and realises the value of investment in staff development and well-being. Our aim is that all members of our community continually flourish and grow together.

We have a highly experienced and skilled Executive Leadership Group. Our approach to school improvement ensures that we champion the sharing of best practice through promoting creative thinking, innovation and valuing all. Every opportunity for schools to support each other, without compromising success, is explored to further develop and grow our staff and the pupils who attend our schools.

The formation of the Multi Academy Trust has allowed us to share expertise and resources as well as identify joint projects and training opportunities. Our pupils benefit greatly from the increased ability of our staff to network and learn from each other. Whilst we work closely together as a group of schools we also celebrate our differences and each school retains their own individuality and their uniqueness.

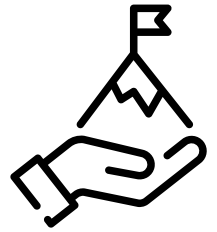
We are on an exciting journey, one where we feel challenged every day and proud that we are always looking for ways to give our pupils better opportunities and outcomes and our staff continuous professional development.

We are an ambitious Trust and we understand that growth comes as a result of showing that we are strong and making a difference. We value all schools within our Trust and all schools are equal partners as we work together, flourish together and grow together.



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**#TogetherWeFlourish**

# OUR VISION AND PRINCIPLES



The Prosper Together Multi Academy Trust continually strives for excellence through aiming to achieve our vision and principles at all times.

## VISION

For the children, families, staff and all those that form our school communities to be empowered and enabled to be the very best they can be.



## PRINCIPLES

In order to achieve our vision, the Trust has agreed a set of guiding principles. **We will:**

- Celebrate each school's distinctive identity whilst developing collective strength;
- Ensure continuous improvement through collaboration, empowerment, challenge and support;
- Ensure financial sustainability and demonstrate legal compliance;
- Work together in a mutually supportive culture of trust, transparency and teamwork.



# THE ROLE AND HOW TO APPLY



The Chief Finance Officer (CFO) will have responsibility for all aspects of Trust finance. Delivering operational rigour and strategic direction, the CFO will play an integral role in supporting the growth and development of Prosper Together Multi Academy Trust and ensure it continues to be financially sustainable.

The CFO will provide insight into commercial decision making and will operationally provide strong financial leadership and guidance. They will utilise their own extensive knowledge and experience to improve the financial stability and sustainability of the Trust, demonstrating how an effective finance function is essential to meet the educational objectives of our Trust.

If you have a strong track record of strategic and financial leadership in the academy, public or private sector, and are wholeheartedly committed to improving outcomes for our pupils through operational excellence, as well as sharing our Trust's values, then we would like to hear from you.



Fully completed application documents should be e-mailed to Susan Hewlett (Trust Business Manager) at [office@ptmat.org](mailto:office@ptmat.org)



Please ensure all application forms are signed

## IMPORTANT DATES...

- Closing date: Friday 30th August 2024, at 5pm
- Candidates selected for interview will be notified on Wednesday 4th September 2024
- Interviews will take place: week commencing Monday 9th September



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# WELCOME FROM THE CHAIR OF THE TRUST BOARD



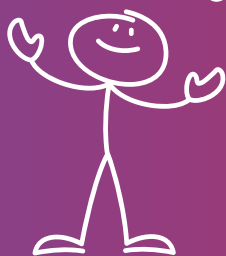
As the Chair of the Board, and one of the original Trustees, I am extremely proud of Prosper Together Multi Academy Trust, what our vision and principles are and how much we have achieved in the short period of time we have been established.

By joining our Trust, you will not simply be joining our organisation, you will be joining a team who are all focused on our shared goals, vision and ethos, which underpins everything we do.

Each of our schools maintains its own uniqueness, nurturing its community relationships, whilst continually seeking school improvement. Our most valuable asset is our workforce and it is of a high priority to us that we continually ensure our Trust is a place which we are proud to be a part of, through developing and supporting staff. The working collaboration between schools is developing well to ensure there is support, challenge and the sharing of good practice to ensure our pupils receive the best learning experience.

It is essential that the successful candidate has passion, enthusiasm and the resilience to build upon the early success the Trust has achieved to date.

**Maurice Malone**  
Member and Chair of the Trust Board



# JOB DESCRIPTION



## INTRODUCTION

As a member of the Trust's central executive team, the Chief Finance Officer (CFO) will have strategic responsibility for all aspects of trust finance, audit and risk. Delivering operational rigour and strategic direction, the CFO will play an integral role in supporting the growth and development of the Trust and ensure it continues to be financially sustainable. Key outcomes / activities are:

- To provide strategic guidance and leadership of all the Trust's finances within the scheme of delegation.
- To be responsible and accountable for the delivery of financial support services throughout the Trust, including the management of Trust's accounting systems and internal controls
- To be the primary point of contact for all aspects of funding and financial/statutory returns.
- To be responsible for the statutory accounts, financial returns and reports to Trustees, ESFA/DfE and other statutory bodies within externally determined deadlines.
- To lead the promotion of sound financial management throughout the organisation in line with the Academies Financial Handbook.
- Ensure sound and appropriate financial governance and risk management arrangements are in place, prepare and monitor budgets and ensure the delivery of annual accounts, in accordance with the Academies Financial Handbook, ESFA guidelines and statutory requirements.
- To be responsible for the payroll and related Human Resources functions of the Trust.

## DUTIES & RESPONSIBILITIES...

### 1 Strategic Leadership

**The Chief Finance Officer leads through:**

- Supporting the CEO and Trust Board to develop, implement and monitor the Trust business plan, using effective financial information and modelling, to support robust decision making.
- Providing strategic advice to the CEO, Trustees and Executive Leadership Group on complex financial issues.
- Analysing and interpreting varied and complex information and delivering solutions and producing plans/strategies.
- Preparing the Trust's annual financial forecasts and reporting to the CEO, Trustees and Executive Leadership Group.

- Developing and implementing strategies for maximising the Trust’s current finances.
- Supporting, quality assuring and having oversight of the financial systems and procedures used by Business Managers/Finance Officers across the Trust.
- Building close and effective working relationships with key partners and stakeholders.
- Participating in the management of major Trust projects as required by the CEO.
- Alongside the CEO, overseeing the long-term plan for capital development across the Trust.
- Developing and reviewing all financial policies and working practices across the Trust.
- Working closely with the CEO and Trustees in relation to risk mitigation, best value procurement and resource management across the Trust.
- Ensuring the Central and school-based finance offer is a high quality, effective, and well-led service, enabling school leaders to focus on the quality of education.

## 2 Finance, Audit & Risk

### **The Chief Finance Officer leads through:**

- Ensuring the Trust complies with its obligations in accordance with the funding agreement, the Academy Trust Handbook and the Trust’s financial regulations and procedures.
- Advising and supporting the CEO in the financial aspects of responsibilities as Trust Accounting Officer.
- Ensuring that the Trust follows best practice in terms of financial governance and ensure probity, and legislative compliance of all financial transactions.
- Contributing fully to all areas of Trust strategy and providing financial analysis and guidance on all activities, plans and targets.
- Leading on the Trust’s approach to Risk Management, being responsible for developing and implementing the Trust’s Risk Management Strategy, including maintenance of the Trust risk register, collaborating with the CEO, Executive Leaders and Trustees to identify and take action to mitigate risks.
- Ensuring the Trust’s approach to internal and external scrutiny is fit for purpose and in line with statutory guidelines.
- Being the main point of contact for the Trust’s appointed internal and external audit consultants, acting as a conduit between Trustees, audit consultants and schools involved in the audit processes and reviews.
- Managing the development of financial reporting systems, including KPIs.
- Providing financial management reports to Trust committees and the ESFA/DfE.
- Being responsible for the preparation of the annual accounts, taking responsibility for the completion and submission of statutory/regulatory reporting in line with prescribed timelines.
- Managing the income and expenditure budgets across the Trust in line with the scheme of delegation.
- Proactively managing the Trust’s relationship with its bankers to ensure that appropriate and efficient systems are in place for the Trust’s accounting procedures.
- Proactively managing the cash position of the Trust and its operating activities.
- Planning and coordinating all tax and treasury management practice and policy.



# 3

## Procurement & Project Management

### The Chief Finance Officer leads through:

- Developing and owning the procurement strategy and ensuring all policies and procedures for ordering supplies and services are robust, fully compliant and operate highly efficiently, generating economies of scale and value for money.
- Advising the Trust on insurance requirements and making appropriate arrangements for insurance cover as required by the Trust.
- Working with the CEO, identifying opportunities to innovate approaches to procurement to ensure best value.
- Working with the CEO, leading negotiations with third parties over the maintenance and development of service level agreements and contracts.
- Overseeing the management of contracts and procurement to ensure that the Trust achieves maximum value for money across all of its activities, and maintaining a strategic overview of services as the MAT grows.

# 4

## Human Resources & Payroll

### The Chief Finance Officer leads through:

- Being responsible for Trust's payroll and related Human Resources functions; working in collaboration with the Trust HR Advisors, Payroll provider, Trust Business Manager and School Business Managers.
- Ensuring legally robust, compliant and forward-thinking HR policies and procedures are in place and are adhered to.
- Ensuring the operation of an effective, efficient and economic HR and payroll function.
- Ensuring relevant legislation, educational employment and equality law and knowledge is up to date and complied with across the Trust.
- Ensuring an accurate, timely completion of payroll each month in line with KPIs, ensuring compliance with all legislation and system requirements.
- Reporting to the CEO and Trust Board on HR and Payroll performance, including absence.
- Managing and quality assuring the Trust payroll, HR advisory and Occupational Health provider contracts.
- Ensuring that the Trust's HR/People system and related procedures are robust and compliant.
- Ensuring that the statutory, procedural and reporting requirements related to the Trust pension schemes are compliant.

# 5

## Organisational & General

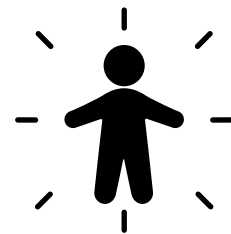
### The Chief Finance Officer leads through:

- Being responsible for the strategic planning, development, design, organisation and monitoring of financial support services and whole Trust systems/procedures/policies.
- Supporting the CEO in overseeing and leading on due diligence for all financial aspects of any new schools joining the Trust.
- Promoting financial awareness throughout the Trust.
- Promoting teamwork, working in partnership to ensure effective working relations.
- Maintaining a presence in local and national professional networks.
- Producing and responding to complex correspondence from stakeholders and external agencies.
- Actively participating in training and other learning activities and performance developments as required.
- Maintaining confidentiality at all times in respect of Trust related matters and to prevent disclosure of confidential and sensitive information.
- Participating in other duties commensurate with the senior nature of the post as directed by the CEO.



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# PERSON SPECIFICATION



The incoming Chief Finance Officer (CFO) will have significant senior financial management and strategic leadership experience either in the public or private sector with accountability for a complex resource base.

Alongside excellent technical ability they will be a strategic thinker with experience of building and empowering strong agile teams that engenders a positive and collaborative culture, sustaining high performing teams that engage with all colleagues across the Trust.

They will need a collaborative, open and approachable leadership style as well as the ability to converse with internal and external stakeholders with integrity.

## CANDIDATES WILL BRING THE FOLLOWING EXPERIENCE...

- Senior financial management and strategic leadership in the public or private sector with accountability for a complex resource base.
- A proven track record of successful financial leadership and building effective teams.
- Significant experience of leading and managing budgets, and working with stakeholders to develop strong financial understanding and empathy across an organisation.
- Experience of developing and managing external relationships with professional regulatory bodies.
- Detailed and up to date knowledge of accountancy and professional codes of practice.
- Advanced knowledge of statutory requirements and funding strategies.
- Substantial knowledge and experience of managing procurements and contracts.
- A proven awareness and respect for the highly sensitive status of information and confidentiality.
- Strong judgement and the ability to look at risk analysis through a commercial - as well as financial - lens.
- Excellent analytical skills and sound judgement.
- An ability to interpret complex financial information, advice and statute and devise policy/practice autonomously in light of these.
- An ability to direct/support a multi-disciplinary team effectively and demonstrate excellent leadership skills.
- An ability to manage own workload without direction, and prioritise in order to meet tight deadlines.

## PERSONAL ATTRIBUTES...

- Highly effective communication skills and the ability to influence and negotiate effectively.
- High ethical standards and influencing skills with the ability to engage effectively with all staff across the Trust and all Trustees.
- An ability to persuade, motivate, negotiate and influence.
- Confidence to challenge opposing views by presenting robust arguments and reasons for the contrary view.
- Excellent written and presentation skills.
- Proficient in use of MS Office applications and Financial Information Systems.
- An ability to work autonomously and flexibly.
- Have resilience when dealing with difficult situations.
- A personal commitment to life-long learning and continuous professional development
- Commitment to high standards.
- An ability to be reflective and self-critical.
- Proactive and self-motivated.
- Have resolution and problem-solving skills.

## PROFESSIONAL QUALIFICATIONS...

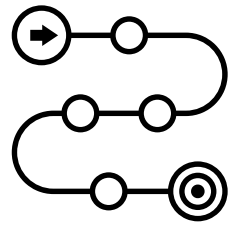
- Professional Accountancy qualifications e.g CIMA, ACCA or CIPFA.
- Educated to degree level or equivalent.

## DESIRABLE (BUT NOT ESSENTIAL) ATTRIBUTES AND EXPERIENCE...

- Experience of working within an educational establishment.
- Experience of working with a Trust Board or similar.
- Working knowledge of the financial framework, governance, statutory and regulatory requirements relating to Academy Trusts.
- Up to date knowledge of Data Protection and Freedom of Information Acts.
- Experience of working with internal and external auditors.
- Experience of matrix management.



# APPLICATION AND SELECTION PROCESS



## WE WILL:



Provide you with clear, accurate and timely information.



Give you the opportunity to ask questions.



Respond to enquiries promptly.



Adopt a fair and consistent assessment process.



Make sure all offers are fair and equitable.

## IN RETURN, WE ASK THAT YOU:



Be honest and upfront about your experience, goals and aspirations.



Provide open and accurate information when submitting your application.



Prepare yourself for the interview and research who we are and how we work.

# SAFER RECRUITMENT AND EQUAL OPPORTUNITIES



## SAFER RECRUITMENT IN EDUCATION INFORMATION FOR APPLICANTS

### Right to work in the UK

The Immigration, Asylum and Nationality Act 2006, makes employers responsible for evidencing that all employees have proven their right to work in the United Kingdom. To evidence your right to work in the UK, you will need to provide appropriate documentation prior to recruitment using a right to work checklist.

### Fitness for Work (Medical Clearance) and DBS Checks

All posts are subject to medical clearance and an enhanced DBS check.

### References

Full details on the references which will be required can be found within the Prosper Together Multi Academy Trust application form.

## EQUAL OPPORTUNITIES

Prosper Together Multi Academy Trust is committed to creating and promoting a diverse and inclusive workforce. All appointments will be made on merit, following a fair and transparent process. Applications are welcome from all suitably qualified candidates regardless of age, disability, ethnic or national origin, gender identity, marital status, political opinion, religion or belief, sex, sexual orientation or trade union membership.

Criminal convictions, cautions and bind-overs will be taken into account for recruitment purposes, only when relevant.





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# CONTACT US

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[rfletcher@ptmat.org](mailto:rfletcher@ptmat.org) (CEO)



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