

## Mater Christi Trust Chief Finance Officer

Candidate Information Pack  
March 2024



## Contents

A welcome from our Chief Executive Officer	Page 3
School Context	Page 5
Mission Statement	Page 6
Chief Finance Officer Job Description	Page 10
Chief Finance Officer Person Specification	Page 14
Application Procedure	Page 17

## Mater Christi Multi Academy Trust

### Welcome from the Chief Executive Officer

Dear Candidate,

Thank you for your interest in the role of Chief Finance Officer (CFO) in the Mater Christi Trust.

The Mater Christi Catholic Multi Academy Trust was established in September 2021, in the Diocese of Lancaster. The Trust consists of thirteen schools currently, two secondary schools and eleven primary schools. We have schools rated from Outstanding to Measures, with different priorities and different challenges. In line with the Bishop's vision for schools across the Diocese of Lancaster, the Trust is growing across Cumbria and North Lancashire (up to 30 primary schools and 5 secondary schools in total).

Our current growth allows us to appoint a CFO to our Central Team. This post holder will join our Executive Team which includes the CEO, the COO, our Director of School Improvement and Development, Director of Governance and our HR Consultant. We have two offices, one in Barrow-in-Furness and one in Carlisle, but the team meet in our schools as well as in the office.

This is a fabulous opportunity for a talented and experienced professional to join us and work with a fantastic group of committed leaders and staff who believe passionately in Catholic education, and who are working to improve the life chances of our children and young people. This post holder will lead finance operations across the trust and will work in close working partnerships with all our schools and stakeholders, as well as working closely with other central team members and myself.

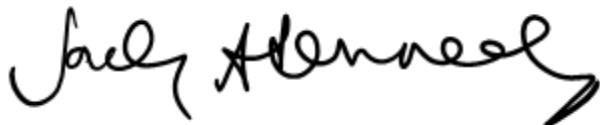
The Trust works in partnership as one family of schools, whilst maintaining and celebrating the uniqueness of each individual school and the community it serves. We have a clear Mater Christi Vision of Loving, Living and Learning Together. In our Trust, we are dedicated to providing a high-quality education so that all our pupils thrive and succeed. The role of the CFO is crucial to supporting our schools to achieve excellence.

We welcome leaders who share our vision and our absolute commitment to our pupils, our staff, our families, parishes and the wider communities we serve.

We look forward to meeting with any prospective candidates and extend a warm welcome to you to visit our Trust and find out more about the role and the difference you can make to our pupils' education.

If you believe you have the knowledge, skills and experience to make a positive contribution then we would welcome an application from you for this vital role as we move into our third year.

Yours faithfully,



Jacky Kennedy  
Chief Executive Officer, Mater Christi Multi Academy Trust



## Our schools

The current Trust schools are:

- Dean Gibson R.C Primary School, Kendal
- Our Lady and St Patrick's Catholic Primary School, Maryport
- Our Lady of the Rosary Catholic Primary School, Dalton
- Sacred Heart Catholic Primary School, Barrow-in-Furness
- St Bernard's Catholic High School, Barrow-in-Furness
- St Cuthbert's Catholic Primary School, Carlisle
- St Cuthbert's Catholic Primary School, Windermere
- St Gregory's Catholic Primary School, Workington
- St Joseph's Catholic Primary School, Lancaster
- St Joseph's Catholic High School, Workington
- St Mary's Catholic Primary School, Ulverston
- St Margaret Mary Catholic Primary School, Carlisle
- St Pius X Catholic Primary School, Barrow

[www.mater-christi.com](http://www.mater-christi.com)





"Inspired by the example of Mary, Mother of Christ, Mater Christi is a family of primary and secondary Catholic schools living and learning together for the common good of our children, families and communities. Our schools will strengthen the Catholic mission in the Diocese of Lancaster and have the wellbeing of our children at the heart of all we do. We are equal partners with a shared calling to ensure our children receive an outstanding education, providing them with the knowledge, skills and spiritual development to excel in all they do."

### As a Trust we aim to

#### Our Catholic Life #Loving

- Encourage the *love* and service of God and others.
- Nurture the Catholic *Faith* of our communities through a rich prayer life.
- Invite all to live an actively authentic life as part of God's family.
- Know and experience the presence of God in our lives.

#### Our Curriculum #Learning

- Work together to provide an excellent education that is relevant to the lives of our young people in each of our schools.
- Support our children to grow in virtue so as to make a positive and *intentional* contribution to society and to bear witness to God's Word.
- Enlighten the lives of our young people by providing a wider curriculum that gives opportunities for all to develop and build their self-belief and worth.
- Enable our young people leave as happy, *compassionate* and fulfilled individuals of good character.



### Our Staff #Together

- Ensure that we appreciate and are *grateful* for the contribution of our staff and Governors to our Mission.
- Actively encourage each other to discern the best possible actions that lead to excellence.
- Place well-being at our heart in the development of our policies and practice.
- Be attentive to the needs of our staff so that they are encouraged to meet their personal goals.

### Pastoral Care #Loving

- Ensure the interests of our children are paramount and guide everything we seek to do.
- Promote and develop eloquence, dignity and compassion so our communities are loving, *hopeful* and *attentive*.
- Honour the richness of diversity in our schools by recognising that all are made in the image of God.
- Support our children to be *wise, learned and curious*.

### Communities and Partners #Trust

- Be *attentive* to the voices in our communities.
- Build truthful, *prophetic* and inclusive relationships.
- Be *generous* in our collaborative work for the positive development of all schools within our MAT.
- Establish clear and relevant communication channels in place allowing our schools and stakeholders to be visible in their local community and across the Diocese.

## Trust Information

The Mater Christi Trust is one of three Trusts in the Diocese of Lancaster. We have three members and nine Directors on our Board. The Board has four committees. This post holder will report to the Finance, Staffing and Audit Committee with the CEO and COO.

### Board of Directors

The Board of Directors is an experienced body of professionals with a wide range of experience, knowledge and skills which they bring to the role. This enables them to hold the Trust leadership firmly to account.

### Heads

Our Heads meet monthly both virtually and face to face to provide an opportunity for our leaders to contribute to the development of the Trust and to work strategically.

### Chairs of Governors

Our Chairs meet half termly virtually to strengthen links between the Directors and the Local Governing Bodies and our Director of Governance works closely with our Governing Bodies to support them in their work. At our Trust meetings our Chairs have the opportunity to contribute to the development of the Trust, receive a report from the CEO and support each other in Governance matters.



## Central Services

Strong operational and system leadership is in place and growing centrally to support the growth of our trust:

### Central Services March 2024

- Chief Executive Officer
- Chief Operating Officer
- Business Managers
- Finance Manager
- Finance Officer
- Finance Assistants/Apprentices
- Director of School Improvement and Development
- Director of Governance
- HR Consultant
- HR Administrator
- The school also uses consultants to support school development work where required.

The Trust will be looking to appoint an Estates Manager and Procurement Officer in the near future.

### Accountability

The Scheme of Delegation adopted by the Trust and schools clearly outlines the accountability at each level of leadership and governance.

## Job Description

Job Title:	Chief Finance Officer (CFO)
Contract:	Permanent, Full Time
Salary Range:	In the region of SCP 47 £55,963 to SCP 54 £65,017
Reporting to:	Chief Operating Officer
Location	Central office; Barrow-in-Furness or Carlisle

### Main responsibilities:

- Being the Chief Financial Officer for the Trust and company.
- Designing and implementing business operations.
- Establishing policies that promote company/school culture and vision.
- Ensuring compliance with statutory ESFA requirements including the Academy Trust Handbook.

### Strategic Leadership Role

#### The CFO will

- Provide advice and guidance to the CEO/COO/Trust Board on all aspects of the Trusts' non-academic operations.
- Deputise for the COO in all aspects of work.
- Shape, implement and deliver the strategic plan.
- Line-manage all Central Financial and Business Services' managers and ensure effective communication and collaboration which enhances the value that the Trust brings to its schools.
- Build and develop a culture of high performance, ensuring succession planning is in place at all levels.
- Ensure support structures reflect the best practice from business and from the emerging research into effective and efficient academy trusts.
- Provide clear information, advice and recommendations to the CEO, COO, school SLTs, Board and various committees regarding the strategic development of support services in the use of assets and the development of the Trust's activities to ensure the best possible learning environment for all students.
- Lead the Trust's Finance function such that: - (i) Resources are directed effectively to provide the most positive educational outcomes for students (ii) The Board, and academies are provided with accurate, timely and actionable financial and management information (iii) Financial systems are managed effectively to expedite the budget cycle and to support decision making across the Trust.
- Work with the CEO/COO to prepare the annual and medium-term business plans, taking into account performance improvement objectives, funding projections, and other potential events and activities and Trust development and procurement plans.

- Take lead responsibility for relevant policy development and implementation in all support areas.
- Ensure the Trust is represented in national, regional, and local networks so that the Trust influences and is alert to new trends and is familiar with current best practice in the evolving and developing education sector.
- Establish a high level of credibility, visibility and professionalism and manage strong working relationships with internal (especially schools and Diocese staff) and external partners.
- Promote and safeguard the welfare of students.
- Work closely with the CEO/COO on developing a strategic plan that develops finance, HR, premises, and other support teams to ensure a proactive approach to maximising the best use of resources.

The CFO will also be responsible for:

- Financial Management and Oversight.
- ICT and technical services.
- Central contracts and services.
- Project management, including funding bids and grants submission.
- Risk Management.
- Leadership and effective day to day management.
- Line management of the following central roles: Estates, ICT support, and Finance.

### Financial Management and Oversight

The CFO will

- Be the Chief Financial Officer for the Trust, ensuring that it works to the standards set out in law or as advised by our Auditors and Financial Advisors and the ESFA.
- Support the CEO/COO in managing operations and will be responsible in delivering the Trust's financial and accounting processes.
- Ensure that there is sound and appropriate financial governance and that risk management arrangements are in place.
- Develop and ensure implementation of the Trust financial management regulations and finance policy.
- Prepare and monitor Trust and school budgets and review and approve annual budgets with CEO/COO and Directors to ensure that all budgetary targets are met, and efficiencies are maximised.
- Ensure delivery of annual accounts and all other returns as required by company, charity and ESFA legislation.
- Advise on financial policies including a procurement policy and strategy.
- Lead on any significant procurement and advises on and monitors less significant procurements in line with the Trust's procurement policy.

- Undertake contract management of any Trust wide contract and supports school-based teams to manage school-based contracts.
- Develop and advise on operational support for the head teachers (where required).
- Ensure there is risk protection cover in place for all risk areas.
- Lead on any significant capital project including managing any application for capital funding and or distribution of any capital grant.
- Ensure long-term financial sustainability, by confirming that proper financial systems are established and effectively monitored, that appropriate action is recommended to address problems identified, and to ensure that the Directors are presented with accurate and timely financial reports.
- Develop and maintain a strong and effective relationship with the ESFA and relevant funding bodies, to ensure the funding streams are secured that support the forecast growth.
- Develop and implement strategies for the generation of additional revenue and resources for the Trust.

### IT and Technical Services

The CFO will

- Develop the Trust's vision for a high-level ICT infrastructure across the Trust.
- Manage the performance of ICT service contracts in relation to agreed KPIs and other performance criteria.
- Ensure value for money and efficiencies with ICT and technical services across the Trust.

### Contracts and Services

The CFO will

- Undertake strategic planning for the most cost-effective use of services.
- Ensure that the obligations undertaken in the 'School Funding Grant Agreement' are met by the schools and reported on in a timely manner.
- Manage and develop the bought in services and contracts across schools on behalf of the Trust.
- Ensure the quality and cost-effectiveness of services to maximise the positive impact on teaching and learning.
- Provide guidance to Headteachers on the most effective deployment of resources and services.
- Identify and mitigate risk and ensure the relevant sections of the Trust's Risk Register is kept updated.
- To attend and facilitate the Trust Finance, Staffing and Audit committee meetings.
- Ensure that purchasing arrangements represent best value and contracts are secured in accordance with financial guidelines and regulations.
- Develop and promote energy efficiency measures across all Schools.

## Estate Management

### The CFO will

- Lead and co-ordinate the maintenance and development of the Trust building and estates, and act as Trust lead for all buildings work.
- Advise the CEO and Headteachers and Heads of School on the strategic development of the Trust sites.
- Ensure effective tendering and management of contracts for work done by external contractors.

## Day to Day

### The CFO will

- Provide day-to-day leadership and management of all teams which report to this post.
- Be aware of and comply with policies and procedures relating to child protection, equal opportunities, confidentiality and data protection (GDPR), reporting all concerns to an appropriate person.
- Maintain high quality working relationships with staff, students and parents/carers that contribute to creating a productive and happy working environment.
- Develop excellent working relationships with suppliers and our contacts.
- Participate in training and other learning activities, as required.
- Attend and participate in meetings, as required.
- Perform all other reasonable requests, as required, within the grading of the post.
- Respect confidentiality at all times.

*The post holder will be expected to carry out all duties in the context of, and in compliance with, all policies and procedures and in compliance with our Equal Opportunities Policies and Code of Conduct*

*The Mater Christi 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, Online Searches, medical check, evidence of qualifications plus verification of the right to work in the UK.*

*The Trust actively promotes diversity, unity and community cohesion and that it supports pupils to become successful, compassionate citizens.*

*The Trust will ensure a continual focus on equality as measured by pupil progress and other outcomes. Whilst every effort has been made to outline the key duties and responsibilities of the role, it is not an exclusive 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.*



## Person Specification

Job Title:	Chief Finance Officer (CFO)
Contract:	Permanent, Full Time
Salary Range:	In the region of SCP 47 £55,963 to SCP 54 £65,017
Reporting to:	Chief Operating Officer
Location	Central office; Barrow-in-Furness or Carlisle

Professional Qualifications	Essential	Desirable	Method of Assessment
Degree or equivalent or relevant experience.		<b>D</b>	<b>Application Form</b>
Professional qualification in business management or equivalent.		<b>D</b>	
Fully or partly qualified with an accountancy body such as the ICAEW, ACCA, CIMA or CIPFA (including CIPFA qualifications developed in partnership with ISBL) <b>or have appropriate experience.</b>	<b>E</b>		
Recognised qualifications in facilities management, procurement, or marketing		<b>D</b>	
<b>Faith Commitment</b>			
Practising Catholic		<b>D</b>	<b>Interview</b>
A willingness to support the Catholic Life of the Trust	<b>E</b>		
<b>Experience &amp; Knowledge</b>			
Track record of success of senior leadership and strategy development within a comparable organisation. Experience of doing this within an educational setting would be an advantage.	<b>E</b>		<b>Application Form Interview References</b>
Awareness and understanding of key issues in relation to finance, ICT, human resources, estates, procurement and contracting, health and safety, and safeguarding	<b>E</b>		
Experience of efficient and effective budget, financial, risk and resource management to achieve accountability and a strong performance culture	<b>E</b>		
Proven success in building effective partnerships and links with internal and external stakeholder.	<b>E</b>		
Understanding of working in a school context and, in particular, a Catholic School and how the role and culture contributes to safeguarding and positive outcomes for pupils.		<b>D</b>	
Experience of working effectively with a Board/Governing body in an equivalent setting.		<b>D</b>	
<b>Skills</b>			
Ability to work strategically and seek and implement creative solutions.	<b>E</b>		

Well-developed strategic planning capabilities with the ability to work with others to develop a compelling vision for the organisation, underpinned by a strong moral purpose.	<b>E</b>		<b>Application Form Interview References</b>
Ability to build a positive organisational culture, encourage reflection, delegate responsibility, build teams, strive for continuous improvement, and inspire staff to achieve their full potential.	<b>E</b>		
Ability to communicate effectively with a variety of audiences and be an effective ambassador of the Trust.	<b>E</b>		
Ability to think creatively, to work strategically, and to anticipate and solve problems.	<b>E</b>		
Proven track record of developing business plans and managing the introduction of new initiatives.	<b>E</b>		
Ability to prioritise, plan and organise, and analyse and process complex information quickly and rigorously, when under pressure acting with decisiveness and determination when dealing with difficult situations.	<b>E</b>		
Strong negotiation skills and the ability to influence others to the benefit of the Trust.	<b>E</b>		
An understanding of legal and regulatory requirements for academies		<b>D</b>	

## Further Information

Start Date	As soon as possible
Salary	In the region of SCP 47 £55,963 to SCP 54 £65,017
Hours of Work	Full time
Contract	Permanent
Pension	LGPS
Expenses	As Policy
Annual Leave	NJC Agreement on Pay and Conditions (Green Book)
Notice Period	3 Months

## Safeguarding

The Mater Christi Trust is committed to safeguarding and promoting the welfare of children and young people in its academies. The Trust complies with the statutory legislative requirements and guidance that seeks to protect children including 'Keeping Children Safe in Education Guidance'.

In order to meet this responsibility, we follow a rigorous selection process to discourage and screen out unsuitable applicants. Safer Recruitment Job descriptions and person specifications make reference to safeguarding and child protection and all posts are subject to an enhanced Disclosure and Barring Service certificate (DBS).

All advertisements include our safeguarding statement and commitment.

All applicants are scrutinised to verify identity and academic or vocational qualifications Professional references are requested using our standard proforma for short-listed candidates.

As a minimum, references should be from the two most recent employers and a Parish Priest, if applicable.

References are checked against previous employment history and gaps in employment. Our standard reference proforma makes reference to suitability to work with children and young people Professional references must be obtained from professional email addresses.

The application form requires applicants to complete a disclosure of any criminal convictions.

### Short-listing

Only those candidates meeting the criteria outlined in the person specification will be shortlisted. Interview Shortlisted candidates will take part in an in-depth interview and selection process.

Candidates will be asked to address any discrepancies, anomalies or gaps in employment in their application form including their employment history.

Candidates will be reminded of their responsibility to disclose criminal convictions that are subject to DBS checks if they have not already done so on the application.

Proof of right to work in the UK must also be provided at interview. Appointment An enhanced Disclosure and Barring Service Certificate (DBS) will be required for all appointed posts and other pre-employment compliance checks will also be carried out.

A fitness to work declaration will be required following appointment.

Inclusion on the Single Central Record (SCR), barred list checks and prohibition from teaching checks will also be carried out.

For leadership positions, section 128 checks will be performed. All staff will receive a comprehensive induction programme covering all aspects of safeguarding and health and safety.

### Equal Opportunities

We recognise the value of, and seeks to achieve, a diverse workforce. We take positive steps to create an employment culture in which people feel confident of being treated with fairness,

### How to apply

Prior to applying: If you are unclear about any aspect of the application process or you would like any additional information about the role, then please contact: Mater Christi Trust HR Administrator, Angela Williams ([Angela.Williams@mater-christi.com](mailto:Angela.Williams@mater-christi.com))

**In compliance with Safer Recruitment Guidelines, C.V's will not be accepted.**

Please fully complete the application form and supplementary forms attached to the job advert on the DfE Teaching Vacancies site, TES, or from our website <https://mater-christi.com/vacancies>.

Completed forms and your supporting statement should be sent via email to [Angela.Williams@mater-christi.com](mailto:Angela.Williams@mater-christi.com)

**Closing Date:** Applications must be received by noon on the 18<sup>th</sup> April 2024

**Shortlisting:** 19<sup>th</sup> April 2024

**Interviews:** 25<sup>th</sup> April 2024.