

# Candidate Brief

## Director of Finance

### Initio Learning Trust



## Welcome to Initio Learning Trust From the CEO



Thank you for your interest in joining Initio Learning Trust. We're delighted that you're considering becoming part of our thriving community of educators dedicated to providing an exceptional education for all our students.

As a multi-academy trust serving 19 schools in Dorset, we're committed to creating a flourishing environment where every child and family can thrive. Our core values of ambition, respect, and collaboration underpin everything we do.

To support our growth and development we are now seeking to appoint a Finance Director to join our leadership team. This is an important opportunity to contribute significantly to our ongoing success and to help shape the future of education in our region. Currently the Trust is supported by an interim Finance Director who is in place until the end of December.

At Initio, we have the highest expectations for all our staff and believe in creating a supportive and inclusive environment where everyone can reach their full potential.

I encourage you to explore this exciting opportunity and learn more about what makes Initio Learning Trust a special place to work and, if you think you have the experience and approach we are looking for, to apply.

*Liz West*

## About Initio Learning Trust

**Initio Learning Trust** is a dynamic multi-academy trust serving 19 schools across Dorset. We are committed to providing exceptional educational experiences for students of all ages, from nursery to upper sixth form.

Founded in 2023 through the merger of The Minerva Learning Trust and Wimborne Academy Trust, we are proud of our rich history and strong foundation. Our focus on excellence and innovation has positioned us as a leading provider of education in the region.

We believe that every individual has the potential to thrive, and our core values of **Ambition, Collaboration, and Respect** guide our approach to education and professional development. We are dedicated to creating a supportive and inclusive environment where our staff can grow, learn, and contribute to the success of our schools.



## The Role

The Director of Finance will lead and oversee the financial management and strategy of the multi-academy trust, ensuring fiscal health, compliance, and sustainability. This role is pivotal in driving financial planning, efficiency, and resource allocation across the trust to support its educational objectives and long-term growth. It will report directly to the CEO and be an active participant in the Trust Executive team.

The finance department is divided into two areas of responsibility;

- **Financial planning** – Led by a Senior Finance Business Partner (who has deputising responsibilities for your role) who is supported by two Finance Business Partners. This team focuses on working with school leaders and budget holders to ensure forecasts are accurate and secure financial strategies are in place to ensure sustainability in all parts of the Trust.
- **Financial control** – Led by the Financial Controller, this team comprises an Accounting Technician, Finance Officer and two part time Finance Assistants. The team is responsible for ensuring good financial controls are in place, producing the monthly accounts and working with auditors to deliver the annual financial statements.

The role is being offered to work flexibly across the year as a 0.6 FTE basis. This will allow the successful candidate to consider how they want to facilitate the working arrangements; this could include but not limited to;

- Working reduced hours outside term time
- Managing own diary to enable the role to have a flexible approach to times worked during the day
- Hybrid working from office and home

Full time options would be considered for the right candidate to take on additional areas of responsibility.

## Salary

The role will attract the following benefits:

- Up to £60k salary (based on 0.6 FTE) (FTE equivalent £100,000)
- Access to the defined benefit local government pension scheme
- Access to all Initio employee benefits as outlined below
- Annual leave entitlement of 5 weeks per year plus bank holidays
- Annual pay reviews in April

## Main Responsibilities

### Strategic Financial Leadership:

- Spearhead comprehensive financial strategy and planning across the trust to ensure fiscal sustainability, adherence to educational sector regulations, and strategic resource allocation to bolster educational achievements.

- Lead the Finance team including taking a leading role in the planning and execution of a shared services model for appropriate support to schools across the Trust whilst working in collaboration with other members of the Trust senior leadership team.

#### **Financial Governance and Compliance:**

- Cultivate a culture of enduring, strategic financial planning in line with the Education and Skills Funding Agency (ESFA) guidelines and other pertinent educational sector regulations.
- Elevate financial decision-making processes by integrating financial considerations into strategic planning, with a keen focus on educational outcomes.
- Promote financial acumen throughout the trust, championing continuous professional development in financial management for academy leaders.
- Enforce strict compliance with financial reporting standards and statutory obligations, tailored to the educational sector's unique requirements.
- Formulate finance policies that underpin the trust's strategic goals and foster long-term financial viability, prioritizing educational excellence.
- Direct and manage VAT procedures to align with HMRC regulations, paying special attention to educational funding and capital projects.
- Engage in collaborative efforts with Trustees, auditors, and regulatory bodies to ensure thorough financial oversight and accountability.



#### **Financial Reporting and Oversight:**

- Lead the creation and execution of a trust-wide financial monitoring system to actively manage financial health.
- Utilize financial analyses to inform decision-making, risk management, and investment strategies, ensuring financial risks are meticulously managed.
- Advocate for effective resource management, working in tandem with educational leaders to judiciously allocate resources in support of the trust's educational goals.
- Foster a culture of resource optimization and value maximization, directing resources towards enhancing student outcomes.

#### **Innovation and Data Utilization:**

- Base financial strategies on Integrated Curriculum Financial Planning (ICFP) and benchmarking data, promoting ICFP principles throughout the trust.
- Lead the evolution of financial management practices, establishing benchmarks for efficiency and effectiveness across all academies.

#### **Diversification of Income and Commercial Ventures:**

- Identify and develop sustainable non-grant revenue streams, ensuring they adhere to legal and regulatory standards.
- Oversee the evaluation and growth of ancillary/traded services, assessing their ROI and strategic contribution to the trust's goals.

#### **General Obligations:**

- Commit to the trust's safeguarding policies, promoting the welfare of children and young people.
- Support and propagate trust policies and procedures, including those related to safeguarding, child protection, and health and safety.
- Display adaptability, responsibility, and a dedication to teamwork, taking on additional duties as necessary and contributing towards the trust's overarching aims.

## The Candidate

- **Financial Leadership:** Demonstrated ability to lead financial operations in large, complex organisations, including budgeting, forecasting, and strategic financial planning.
- **Strategic Planning:** Expertise in aligning financial strategies with organisational goals, managing financial risks, and ensuring long-term sustainability.
- **Analytical Skills:** Ability to interpret financial data, spot trends, and provide evidence-based recommendations to support decision-making.
- **Communication and Presentation:** Skilled at explaining complex financial information to non-financial stakeholders through clear, concise presentations and reports.
- **ICT Proficiency:** Advanced proficiency with financial software, Microsoft Excel, and reporting systems for accurate financial oversight.
- **Team Leadership:** Experienced in managing, motivating, and developing finance teams to foster collaboration, accountability, and high performance.
- **Project Management:** Expertise in managing financial elements of major projects, especially during periods of organisational restructuring or change.
- **Negotiation:** Strong negotiation skills to build relationships with suppliers, auditors, and partners, ensuring favourable terms for the organisation.
- **Educational Sector Finance:** Knowledge of funding arrangements, financial regulations, and reporting requirements specific to Multi-Academy Trusts (MATs).
- **Accounting Standards:** Expertise in GAAP, IFRS, and charity accounting standards (SORP).
- **Compliance and Governance:** Familiarity with financial governance, internal controls, and regulatory compliance frameworks within the education sector.
- **Taxation:** Understanding of VAT and other tax implications for educational institutions.
- **Trust Operations and Restructuring:** Knowledge of financial impacts during growth, mergers, or consolidation within a trust or public sector body.
- **Senior Leadership in Complex Organisations:** Experience in finance leadership roles within education, public sector, or large organisations.
- **Budget Management:** Skilled in managing large budgets, ensuring proper resource allocation, and maintaining budgetary control.
- **Stakeholder Engagement:** Experience working closely with trustees, auditors, and senior leadership teams to align financial goals with strategic priorities.
- **Risk and Change Management:** Expertise in financial aspects of restructuring, risk management, and audit processes.
- **Problem-Solving & Innovation:** Strong problem-solving abilities and a forward-thinking mindset to address financial challenges creatively.
- **Leadership & Collaboration:** Inspires teamwork across departments and works closely with colleagues to achieve shared objectives.



- **Integrity & Resilience:** Demonstrates ethical behaviour, transparency, and the ability to perform under pressure.
- **Customer-Focused:** Committed to providing excellent financial support to schools, ensuring alignment with educational outcomes.
- **Qualifications** Qualified Accountant e.g. ICAEW, ACCA, CIPFA, CIMA.

### How to Apply

Initio Learning Trust has an interim Director of Finance in post until December, it is strongly recommended to arrange an informal conversation with him to discuss your potential interest in the role. Please contact Jo Dickinson, PA to Executive team, via email to arrange this on [info@initiolearning.org](mailto:info@initiolearning.org).

Candidates wishing to be considered should follow the link below to apply via our in-house recruitment applicant tracking system.

<https://initiolearning.current-vacancies.com/Careers/Intitio-VSP-3256?SiteID=6322>

### Selection process

A two-day process will be used;

#### Day 1

Focus on ensuring candidates have the skill required to complete the role requirements. It will involve a number of assessments designed to cover key elements within the job description

Candidates will be shortlisted further at the end of day 1.

#### Day 2

Candidates will be given a presentation title at the end of day 1 and be invited to deliver this presentation to a panel followed by set questions about the role.

### Safeguarding Statement of Intent

Initio Learning Trust is committed to safeguarding and promoting the welfare, both physical and emotional, of every pupil both inside and outside of Trust school premises. We implement a whole-school preventative approach to managing safeguarding concerns, ensuring that the wellbeing of pupils is at the forefront of all action taken.



The Trust has a Safeguarding (Child Protection) policy which sets out a clear and consistent framework for delivering this promise, in line with safeguarding legislation and statutory guidance. Each of the Trust's schools has their own Safeguarding (Child Protection) Policy, written in line with the Trust's Policy and with the Pan Dorset Policy and Procedures.

Our commitment to safeguarding will be achieved by:

1. Creating a culture of safer recruitment by adopting procedures that help deter, reject or identify people who might pose a risk to children;

2. Teaching pupils how to keep safe and recognise behaviour that is unacceptable. Identifying and making provision for any pupil that has been subject to abuse;
3. Ensuring that members of the Trust Board, Academy Committee, the headteacher at each Trust school and all staff members across the Trust understand their responsibilities under safeguarding legislation and statutory guidance, are alert to the signs of child abuse and know to refer concerns to the DSL; and
4. Ensuring that the headteacher and any new staff members and volunteers within the Trust and our schools are only appointed when all the appropriate checks have been satisfactorily completed.

## **Initio Learning Trust Candidate Charter**

### **Our Commitment to You**

At Initio Learning Trust, we are dedicated to providing a positive and transparent candidate experience. We are committed to the following principles:

- **Respect and Fairness:** We treat all candidates with respect, honesty, and fairness throughout the hiring process.
- **Privacy Protection:** Your personal information is handled with the utmost care and confidentiality.
- **Informed Decision-Making:** We provide you with all the necessary information to make informed decisions about your application.
- **Talent Showcase:** We offer opportunities for you to demonstrate your skills, experience, and potential.
- **Constructive Feedback:** We provide timely and professional feedback on your application and interviews.
- **Open Communication:** We welcome your feedback and actively listen to your input.
- **Inclusivity:** Our hiring practices align with our commitment to building a diverse and inclusive workforce.

### **What We Will Do**

- Provide clear, accurate, and timely information about the application process.
- Offer opportunities for you to ask questions and receive answers.
- Respond to inquiries promptly, typically within 24 hours during business hours.
- Employ a fair and consistent assessment process.
- Ensure you have all necessary documentation and details for interviews well in advance.
- Provide insights into what it's like to be part of our team.
- Offer fair and equitable employment offers.
- Seek feedback on your candidate experience to continuously improve our processes.

### **What We Ask of You**

- Be honest and upfront about your experience, aspirations, and motivations.
- Provide accurate and complete information in your application.
- Research our company and how we work to give yourself the best chance of success.
- Communicate any changes in your application status or reasons for withdrawing.
- Prepare for interviews and let us know how we can assist you.

## Our Commitment to Staff Development and Wellbeing

At Initio Learning Trust, we believe in empowering our employees to thrive in their roles. Our core values of Ambition, Collaboration, and Respect guide our commitment to providing genuine professional development opportunities and fostering a supportive work environment.

We offer our staff:

- Career Progression: Opportunities for advancement within our schools and teams.
- Continuous Professional Development: Tailored training and support for all staff, regardless of role or career stage.
- Comprehensive Benefits: A competitive benefits package including:
  - Employee Assistance Program (EAP)
  - Health cash plan
  - Cycle-to-work scheme
  - Wellbeing discounts
  - On-site parking (at most locations)
- Employee Wellbeing: A focus on employee health and happiness through:
  - Access to the EAP
  - Employee voice initiatives (surveys, focus groups)
  - Wellbeing and stress management training
  - Menopause support program
  - Recognition programs (Unsung Heroes)
- Diversity and Equality: A strong commitment to creating an inclusive workplace where all employees and learners are valued and respected.