

BLESSED HOLY FAMILY CATHOLIC ACADEMY TRUST

'Amor, ministerium et fides'



CHRIST AT OUR CENTRE, INSPIRING OUR PURSUIT OF EXCELLENCE

Chief Financial Officer Job Description

This is an exciting development opportunity within the established Blessed Holy Family Catholic Academy Trust. We are looking for a creative and driven individual who will support the schools within the Trust and support us in establishing systems to welcome new schools to the trust in the future.

The CFO will have oversight of all operational responsibilities until further growth leads to new roles being created within the Trust.

The role is full time and the successful candidate will report directly to the CEO of the Trust.

Overall Purpose of the Job

As a member of the Trust's Executive Team, the Chief Financial Officer (CFO) will have strategic responsibility for all aspects of Trust finance, asset management, risk management and capital planning and procurement.

Delivering operational rigour and strategic direction, the CFO will play an integral role in supporting the development and growth of the Trust and ensure it continues to be financially sustainable.

The CFO will lead strategically and operationally to provide excellent financial leadership, guidance and support to the Trust board and all schools within the Blessed Holy Family Catholic Academy Trust.

Key Outcomes/Activities

To provide strategic guidance, leadership and management of all the Trust's finances within the scheme(s) of delegation, advising the CEO, Trustees and headteachers on all financial matters relating to the Trust.

To be responsible and accountable for the delivery of financial support services throughout the Trust, including the management of Trust's accounting system and internal controls and implementation of a new finance system and internal reporting structure.

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 in accordance with guidance and externally determined deadlines.

To lead the promotion and delivery of sound financial management throughout the organisation, in line with the Academy Trust Handbook.

The CFO will 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 Academy Trust Handbook, ESFA guidelines and all statutory requirements.

Finance, Audit & Risk

To ensure the Trust complies with its obligations in accordance with the funding agreement, the Academy Trust Handbook and the Trust's financial regulations and procedures.

To advise and support the CEO in the financial aspects of their responsibilities as Trust Accounting Officer.

The CFO must ensure that the Trust follows best practice in terms of financial governance, and ensure the probity, and legislative compliance, of all financial transactions, including the integrity and suitability of all control mechanisms (audit and risk management).

As financial lead in the strategic planning process, deliver annual and medium-term budget plans, periodic forecasts and funding requirements, working closely with the CEO and headteachers to ensure consistency with the Trust's strategic and financial objective.

Contribute fully to all areas of Trust strategy and provide financial analysis and guidance on activities, plans and targets.

Ensure that infrastructure services are of high quality and well-led, cost effective and efficient, and enable schools to focus on the quality of education.

To ensure a successful approach to managing the General Annual Grant (GAG) that achieves a strategic, needs-led approach to resourcing, promoting the mission and identity of one trust looking after all young people's interests.

Continually review and improve the existing financial systems and policies ensuring they are streamlined, efficient, robust, compliant and support current activities and future growth.

Lead on the Trust's approach to Audit & Risk Management.

Act as the main point of contact for the Trust's appointed Internal Audit and External Audit consultants, acting as a conduit between Trustees, audit consultant teams and academy/Trust colleagues involved in audit processes and reviews.

Ensure the Trust's approach to internal and external scrutiny is fit for purpose and in line with statutory guidelines.

Lead on the management of the Trust's Risk Register and direct colleagues as appropriate to ensure risks are managed effectively and updates are reported to Trustees in line with the reporting calendar.

Manage the development of financial reporting systems including KPI's.

Provide financial management reports to the Board of Trustees, Finance & Resources Committee, Risk and Audit Committee, and DfE/ESFA.

To be responsible for the preparation of the annual accounts to prescribed standards, taking responsibility for the completion and submission of statutory/regulatory reporting in line with prescribed timelines.

To manage the income and expenditure budgets across the Trust in line with the scheme of delegation, and to identify any potential financial risk and implement strategies to address issues arising.

To proactively manage the Trust's relationship with its bankers, to ensure that appropriate and efficient systems are in place for the Trust's accounting procedures.

To proactively manage the cash position of the Trust and its operating activities, reporting regularly on this aspect of financial management to the Trustees.

To coordinate tax and treasury management practice and policy, with particular reference to charitable status, cash management and investments.

Strategic Leadership Responsibilities

To provide strategic advice to the CEO, Trustees, headteachers and Committees on financial and operational issues.

To prepare the Trust's annual financial forecasts, medium and long-term corporate plans and report to the CEO, Trustees and headteachers.

Develop and implement strategies for maximising the Trust's current finances.

Lead the central finance team, including line management and the development and quality assurance and oversight of financial systems and procedures.

To build close and effective working relationships with key partners and stakeholders.

To participate in the management of major Trust projects as required by the CEO.

To oversee the Trust's long-term plan for capital development and investment, managing all financial aspects of major capital projects.

To develop, design and implement financial policies and working practice across the Trust to streamline functions and ensure efficiency and value for money.

Work closely with the CEO, Central Team & Trust Board in relation to risk mitigation, best value procurement and resource management across the Trust ensuring financial sustainability and appropriate use of funding.

Payroll & Pensions

Ensure services for Payroll and Pensions across the Trust are efficient, of best value and ensure compliance with all relevant legislation and up to date legislation.

Procurement & Project Management

Own the procurement strategy and ensure all policies and procedures for buying and ordering supplies and services are robust, fully compliant and operate highly efficiently, generating economies of scale and value for money.

Advise the Trust on insurance requirements and make appropriate arrangements for insurance cover as required by the Trust.

Identify opportunities for innovative approaches to procurement to ensure best value.

Lead negotiations, with third parties over the maintenance and development of service level agreements and contracts for the delivery of some aspects of advice and support to the organisation and reporting these to the CEO & board accordingly.

To oversee the management of contracts and procurement to ensure that the Trust achieves maximum value for money across all its activities and maintain a strategic overview of services as the CAT grows.

Capital Planning & Asset Management

Identify capital grant opportunities and oversee the preparation for capital grants and bids.

Contribute to the preparation of a rolling programme of annual capital purchase plans.

Produce and implement appropriate policies and procedures for the procurement, depreciation and disposal of assets.

Organisational Responsibilities

To be responsible for the strategic planning, development, design, organisation and monitoring of financial support services and whole Trust systems/procedures/policies.

Undertake a lead role in supporting the conversion of new schools into the Trust including overseeing due diligence for all financial and infrastructure aspects.

Audit all financial functions across the Trust and recommend new structures to meet evolving needs.

To promote financial awareness and training throughout the Trust.

To interpret matters of policy/procedure/statute and ensure the Trust's compliance and initiate appropriate action arising.

To identify and implement opportunities for collaborative working across the CAT.

General Responsibilities

Contribute to and uphold the overall vision, mission and identity of the CAT.

Recognise own strengths and areas of expertise and use these to inspire, advise and support others.

Promote teamwork, working in partnership to ensure effective working relations.

Treat all users of the Academies within the Trust with courtesy and consideration.

Be aware and comply with equal opportunities and all Trust policies at all times.

To assist with the development of policies and procedures as may be required outside remit of role.

To maintain a presence in local and national professional networks and through these, and other means, ensure a continuous overview of appropriate policies and developments to keep abreast of current and best practice.

To produce, and respond to, complex correspondence from stakeholders and external agencies.

To participate in training and other learning activities and performance development as required.

To maintain confidentiality at all times in respect of Trust-related matters and to prevent disclosure of confidential and sensitive information.

Other duties commensurate with the senior nature of the post, as directed by the CEO.

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Chief Financial Officer Person Specification

Description	Essential	Desirable
Professional Qualifications and Experience		
Qualifications Professional Accountancy qualification e.g. ACA, CIMA, CIPFA	Y	
Educated to degree level or equivalent	Y	
Successful experience in senior financial management and strategic leadership either in the public or private sector with accountability for a complex resource base	Y	
Demonstrable track record of successful financial leadership and building effective teams	Y	
Demonstrable experience of leading and managing large budgets, and working with stakeholders to develop strong financial understanding and empathy across the organisation	Y	
Demonstrable experience of developing and managing external relationships with professional and regulatory bodies	Y	
Demonstrable evidence of entrepreneurialism and innovation, with an ability to identify commercial opportunities to maximise income	Y	
Experience of working within an educational setting, including experience of working with Governors, Trustees, or similar	Y	
Up to date knowledge of accountancy and professional codes of practice	Y	

Substantial knowledge and experience of managing procurement and contracts	Y	
Proven awareness and respect for the highly sensitive status of information and its confidentiality	Y	
Up to date knowledge of Data Protection and Freedom of Information Acts	Y	
An understanding/experience of working with external auditors and agencies	Y	
An understanding/experience of working within an academy/knowledge of the Academy Handbook and ESFA funding arrangements.		
Effective planning and organisational skills organisation	Y	
Strong judgment and the ability to look at risk analysis through a commercial as well as financial lens	Y	
Excellent analytical skills and sound judgement	Y	
Ability to interpret complex financial information, advice and statute and to devise policy/practice autonomously in light of these	Y	
Ability to direct a multi-disciplinary team effectively and demonstrate excellent leadership skills	Y	
Ability to manage own workload without direction, having the ability to prioritise in order to meet tight deadlines	Y	
Proficient in the use of MS Office applications and Financial Information Systems	Y	
Interpersonal & Communication:		
Highly effective communication skills and ability to influence and negotiate effectively	Y	
Ability to present complex information to a wide audience requiring high levels of negotiation, persuasive skills with diplomacy and confidentiality, with ability to report and challenge as necessary	Y	
High ethical standards and influencing skills with the ability to engage effectively with all staff across the Trust	Y	
Ability to persuade, motivate, negotiate and influence; having the confidence to challenge opposing views by presenting robust arguments and reasons for the contrary view	Y	
The ability to relate well to young people and adults	Y	
Excellent written and presentation skills	Y	

Initiative & Independence		
As a strategic member of the BHFCAT the post-holder will be required to represent both the Trust Board and CEO at external meetings and in the wider community, using initiative and discretion as required	Y	
Ability to demonstrate entrepreneurialism and innovation, and an ability to identify commercial opportunities to maximise income	Y	
The ability to work autonomously and flexibly to influence strategic decision making	Y	
The postholder may be required to apply resilience when dealing with emotions/challenges from staff, suppliers and contractors on an infrequent basis	Y	
Philosophy and Commitment		
A knowledgeable and broad understanding together with an interest in education (primary & secondary) with a strong moral purpose	Y	
A belief that everyone can benefit from, and has entitlement to, high quality educational opportunities	Y	
A personal commitment to lifelong learning and continuous professional development	Y	
Commitment to high standards, best value and continuous improvement	Y	
Ability to be reflective and self-critical	Y	
Proactive and self-motivated		
Flexibility, creativity and ability to think laterally		