



UTTOXETER
LEARNING TRUST
INSPIRED TEACHING
INSPIRING CHILDREN



Chief Finance Officer
Application Pack

"Inspiring Teachers, Inspired Children and Young People"



Welcome Message from the Chair of the Academy Trust: Sid Slater

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Thank you very much for requesting the details for the post of Chief Finance Officer.

Uttoxeter Learning Trust is a multi-academy trust created by the schools in Uttoxeter and the surrounding area. The first three schools to go live in ULT were Picknalls First School, Windsor Park CE Middle School and Thomas Alleyne's High School, all of which became academies on 1st April 2017. Five further schools have joined us since then and we have a new Free school opening in September 2022. The ULT includes First, Middle and High Schools, several of which are small, rural schools (including Church of England). This forms a 3-18 all-through educational family, supporting each other and providing excellent teaching and learning, attainment and progression, outstanding extra-curricular activities and a friendly, safe and caring educational environment.

The Uttoxeter Learning Trust has initially grown as a Multi-Academy Trust (MAT) based on the schools of a distinct geographical community in and around Uttoxeter. We are also interested in engaging like minded schools from further afield. The strength of our model is that it focuses on the principles of:

- Community, Continuity and Diversity: Our aim is to attract like minded providers of education, both 3-tier and 2-tier, to establish a 3-18, all-through school network. This will create a self-improving school system and will strengthen the links between the schools, especially the small, village schools. The inclusion of both church and community schools will sustain diversity whilst forging common cultural linkages.
- Partnership and Sustainability: High quality leadership will build successful learning communities through e.g. a program of partnership meetings for Heads, Chairs of Governors and middle leaders held throughout the year to share best practice, and through best value management.
- Capacity: As the performance of most of the schools is strong, we have the capacity to support each other to continue to improve. Both pupils and staff will have the chance to benefit from the best that is on offer across the MAT. However, we will look to strengthen this capacity in the future.

For an informal, confidential discussion regarding any queries, please contact: the CEO Sarah Clark on 07902472080. Site visits can be arranged.

We look forward to hearing from you.

"Inspiring Teachers,
Inspired Children and Young
People"



Vision, Values and Strategy

Vision

Our vision is to grow our family of schools, and our pupil and staff community, within Uttoxeter and beyond, to provide an outstanding education and become one of the leading multi-academy trusts in the country.

About Uttoxeter Learning Trust

Through our common purpose and values, we offer an inspiring curriculum that allows our young people to develop both personally and academically.

We do this by inspiring pupils through inspired teaching. We empower young people to realise their potential and surpass their own expectations from Early Years to Post 16, imparting the knowledge, skills and behaviours to ensure they are fit for the future.

Our all-through schools network enables the ideal transition between phases of education, supporting high levels of progress and inclusivity. At the same time, all our schools have an independence that allows them to best serve their communities, supported by delegation of a range of powers to our local governing boards.

As a growing Trust we are supporting our schools to excel through a strong central team, in addition to Governors, Trustees and Members who offer a variety of experience and expertise.

By working with employers and higher education providers we enrich learning opportunities and secure competitive destinations for pupils when they leave our care.

We focus on on-going evaluation and improvement, collaborating between schools and drawing on expertise both

within and external to the Trust to ensure the best education, professional development, and value for money.

Our Core Values

We want our young people to be happy, caring, respectful and high achieving.

We believe that by working together to innovate teaching and learning we can inspire and release the potential of every child and young person.

We create an inclusive community where everyone is welcome whatever their beliefs, gender, age, sexuality, disability and race, so that no child is left behind.

We provide civilized and safe educational environments where children and young people can learn how to become good citizens.

Our staff are professional, caring and collaborative, treating colleagues and pupils with generosity of spirit.



Aims and Objectives of the Trust

Our aim is for our schools, both faith and non-faith, to share good practice, meeting the needs of our young people, our communities and our global society.

Our objectives are to:

Cultivate and value the achievements and positive attitudes of our young people whilst keeping them safe and well, ensuring equality and celebrating diversity.

Use expertise across the Trust to innovate teaching and learning to be at the forefront of educational practice and a self-improving organisation, preparing pupils for the changing world of work.

To continue to develop our school community through dissemination of good practice and interdependence

Develop a central team that offers expertise in many areas, supporting schools to build on their performance and ensure accountability and value for money.

Strengthen partnerships with external agencies, charities, local communities, and business to ensure that the education within the Trust is supported by a broad curriculum offer which promotes STEM as well as creativity, languages and humanities, and narrows the performance gap between groups of students.

Develop and retain strong leadership through on-going professional development supported by the teaching school, succession planning and addressing workload and the well-being of our workforce.

Strategy

Short Term:

- Conversion to multi academy status was phased, starting with a group of three schools, all of which converted in April 2017; the second cohort converted in January and April 2018, and included the two rural first schools and a third Uttoxeter middle school.
- Our Teaching School created numerous additional school improvement opportunities for all. Although this closed in 2021, we now access training opportunities through the Teaching School hub and we are developing our internal training programmes.
- We continue to audit the evidence of current performance to ensure that all schools continue to provide at least a 'good' standard of education so that there is the capacity to support and challenge each other in the future.
- We have expanded our work as strategic partners in local Teaching School Alliances to supplement our capacity
- We review and share best educational practice across the MAT and put in place action plans to sustain improvement through a model of collaboration.
- We review and share the best management and organisational practices, including seeking best value for money through improvements in economy, efficiency and effectiveness and ensure that every academy can set a sustainable budget.
- We have developed good working relationships with external agencies including the Regional Schools Commissioner team, the Lichfield Diocese and other local schools .
- We continue to address the challenges that resulted from the global pandemic developing our ability to deliver a blended curriculum and address any gaps in learning.
- We have appointed a full-time CEO to support the growth of the Trust
- Liaison with other Trusts has supported development of shared working on shared sites.
- We have appointed Executive Headteachers across sites to support school improvement and development programmes
- A further school, the Richard Clarke First School has formally joined

the Trust on 1 September 2021, after a successful period as an associate member from April 2019.

- The Trust now also includes a new Free School Bramshall Meadows First School, opening in September 2022 and has places for 150 pupils, age 4 to 9, and nursery age children.

Medium Term:

- We will continue to grow as an effective self-improving school system, sharing our expertise and successes and developing further our resources and capacity in order to support each other and any external educational partners.
- Attainment and progress figures for children in every school will be above national averages and will compare well against those of similar schools and there will be a smooth, well planned transition between different phases.
- All schools will continue be judged at least 'good' by Ofsted and SIAMS
- We will engage with the local teaching hub model and develop our Trust CPD model to support staff professional development and succession plans.
- We will ensure the effectiveness of small institutions by promoting closer working relationships between them.
- We will continue to grow in pupil numbers as a Trust, including welcoming like-minded partner schools/academies from outside the immediate Uttoxeter area.
- We will continue to review and strengthen the central team to provide an excellent level of service and value for money

Longer term:

- Our schools will be performing in the top 20% nationally when compared with similar academies, and some will be judged outstanding. None will be less than 'good.'
- We will continue to develop and grow to strengthen the Trust in every aspect

CFO: Job Description



Key purpose

- Provide strategic management and leadership of the financial and commercial operations and performance of the Uttoxeter Learning Trust.
- Undertake the role of Chief Finance Officer as outlined in the EFA Finance Handbook and other documents from EFA/DFE.
- Ensure that the Trust resources are managed efficiently, ethically, professionally, with integrity and conforming to all internal and external regulatory requirements and in a sustainably sound manner.
- Provide sound financial advice to the Uttoxeter Learning Trust trustees, directors and senior management colleagues.
- Act as the leading point of reference for financial and commercial issues.
- Report on a timely basis to the DFE and other relevant bodies in line with their specific requirements.
- Be a catalyst for driving efficiencies across the Trust.
- and Academies Accounts Direction issued annually by the DfE which sets out the requirements for the preparation and audit of the annual reports and financial statements of the Trust.
- Ensure that monthly management accounts and other ad hoc reports as required are prepared on a timely basis along with appropriate management commentary comparing performance against budget and analysing variances.
- Work with the Chief Executive Officer and leadership team of the Trust to develop and deliver the 3 year financial plan taking into account DFE guidelines/funding and identifying additional sources of external revenue and funding.
- Ensure the appropriateness of the key assumptions included in the corporate plan, medium and long term financial plan and annual budget proposals.
- Prepare the annual budget in accordance with the requirements of the Trust and DFE.
- Maintain records to meet legal and tax requirements and to measure both in the inputs and the outcomes of the Trust operations.

Specific duties and responsibilities include:

- Contribute to the ethos, development and success of the Trust.
- Act as the leader for all finance related work; this includes leading staff within the Trust employed with a finance function.
- Ensure that financial management within the Trust complies with the requirements of the Academy's Financial Handbook
- Production of monthly and annual accounts in accordance with the Companies Act 2006, UK accounting standards and DFE requirements, together with a detailed commentary on the result and on all significant variances from budget.
- Establish and maintain the academies financial and accounting systems and ensure the provision of financial information to the Academy management, Trust board and external bodies as required.

CFO: Job Description (continued)

- Provide leadership for all academies within the Trust to establish the annual budgets for each academy, oversee the monitoring of expenditure and annual balancing of end of year accounts. Ensure financial probity and sustainability of the Trust.
- Establish and maintain the academies financial and accounting systems and ensure the provision of financial information to the Academy management, Trust board and external bodies as required.
- Act as the point of reference for all academies within the Trust to establish the annual budgets for each academy, oversee the monitoring of expenditure and annual balancing of end of year accounts.
- Implementation and operation of rigorous and robust audits and controls.
- Manage the central accounting role; ensuring that efficient income and payroll controls are in place and adhered to.
- Management of the Trusts financial position at a strategic and operational level with the framework of financial control including: management of cash balances and cash flow, management of tax and VAT liabilities, and identification of opportunities to improve value for money.
- Support the CEO in their role as the Trust's Accounting Officer and ensure that the Trust and its schools operate good financial governance in line with the requirements of the Academies Trust Handbook.
- Ensuring that appropriate internal control processes are in place, in accordance with DFE Funding Agreement to eliminate the risk of financial losses and to maximise economy and efficiency in the use of resources and enable accountability at appropriate levels.
- Establish and maintain a risk register for the Trust to record risks and opportunities as they arise.
- Liaise with outsourced companies to ensure the integrity of accounting for payroll transactions and that payroll reconciliations are properly performed.
- Making appropriate arrangements for the external audit of accounts and liaison with auditors during their audit work.
- Ensuring that an ethical purchasing system is in place to ensure value for money is obtained and best use made of resources.
- Preparing bids, and generating new income streams and grant funding, which are supportive of the Trusts commitment.
- Preparation of financial appraisals for new projects.
- Management and oversight of the Trusts assets ensuring that the full inventory of assets are recorded in an asset register and that accounting for fixed assets is in accordance with Companies Act and appropriate accounting standards.
- Ensuring appropriate insurance cover is in place and arrangements are regularly reviewed and monitored.
- Keep abreast of financial developments across academies, including direction from the DFE and charity sector.
- Plan and manage the Trust's tax affairs under existing and new legislation.
- Liaise with appropriate bodies in such areas as: legal, regulatory, approvals and accreditations.
- Ensure that academy based finance staff receive timely, succinct and clear guidance to ensure that they are effective and efficient in the discharge of their duties.

General

- Be expected to actively support the work and ethos of the Trust.
- Be expected to undertake such additional duties as may reasonably be requested by the Chief Executive Officer or their representative.
- Participate in arrangements for appraisal and in the identification of areas in which s/he would benefit from training and undergo such training.
- Proactively keep abreast of developments in relation to the post, and whenever possible and appropriate, attend professional development opportunities.
- Comply with and support all policies related to equal opportunities and safeguarding children.

This job description will be reviewed annually to reflect the plans, growth and development of the Trust

CFO Person Specification



Key Criteria	Essential	Desirable
Professional Qualifications	<ul style="list-style-type: none"> A professionally qualified accountant (ACA, ACCA or CIMA or CIPFA) A record of recent and relevant continuing professional development 	
Skills, Abilities and Competencies	<ul style="list-style-type: none"> Ability to demonstrate a track record of successful financial leadership and building effective teams including experience of designing and implementing financial management processes and controls Experience of financial reporting and management skills and working with stakeholders to develop strong financial understanding and empathy. Have high ethical standards and influencing skills with the ability to engage effectively with all staff across the Trust and with the Trust Board Experience of demonstrating entrepreneurship and innovation, with the ability to identify commercial opportunities to maximise income and minimise costs Understanding of the statutory educational framework, current educational issues relating to academies, Company and Charity Law and knowledge of relevant policies, legislation and codes of practice across education Have a good knowledge of the funding, regulatory and legislative environment of academies An understanding of the principles and practices of risk management Resource management – estimating, securing and monitoring resources with the ability to interrogate school performance data and finances accurately and identify next steps for progress Ability to advise on funding and grant opportunities for the Academy Trust Proven track record of developing business planning and managing the introduction of new initiatives – and in particular large scale asset development /school buildings projects Ability and commitment to work flexibly and collaboratively as part of a team whilst taking a leading role when required 	<ul style="list-style-type: none"> Previous experience in a public sector environment working in a school or academy financial role and managing school budgets Experience of working in a multi-entity environment Previous experience of generating income and preparing bids for grant funding Experience working with the Diocese and the Church of England Experience and understanding of the EFA financial handbook Experience of income earning within a multi academy trust

Person Specification

Continued

Key Criteria:	Essential	Desirable
Behavioural Competencies	<ul style="list-style-type: none">• A team player with strong empowerment skills• Excellent communication and presentation skills• Methodical and organised approach to work• Ability to think strategically	
Personal Qualities	<ul style="list-style-type: none">• Excellent relationship management, with the ability to build effective working relationships at all levels, and reinforce partnerships• Ability to articulate vision to a variety of audiences• Advocacy, facilitation and negotiation skills• Intellectually versatile and innovative• Emotionally intelligent and perceptive• Honest and transparent in all business activities• Demonstrates energy, dynamism and resilience• Proactive and positive approach to problem solving• Calm under pressure and self-motivated• Ability to influence and pursue challenging and rigorous questions• Excellent interpersonal, skills with the sensitivity to work well in a range of situations	Experience of successfully working with Governing Bodies



How to apply

Salary package - Grade 13 £52,860 to £57,056 dependent upon calibre of candidate
Contract type — full time, permanent

A base at a Uttoxeter Learning Trust school / central office

We welcome suitably experienced and interested applicants to complete a full application and submit the form by emailing pa2ceo@uttlit.com. All applications will be acknowledged on receipt.

Closing date for applications: 16 September 2022 at 12 noon

Interviews and assessment activities are planned to take place on 28 September 2022 (full day)

How to apply

Please submit the Uttoxeter Learning Trust Application form which includes your personal statement in no more than two sides of A4, detailing why you think you are the person we need, including verifiable evidence of your experience, skills, abilities and knowledge and how you would contribute to the development of the Trust going forward.

Your application should include full contact details (address, daytime, home and mobile telephone numbers where applicable and email addresses) and details of 2 referees. For each referee please provide their name, position, organisation, telephone numbers and email addresses where known. One of these referees must be your current or most recent employer. If you do not wish us to contact referees at this stage please make this clear.

Please ensure you also return the recruitment monitoring form.

The MAT is committed to safeguarding and promoting the welfare of children and young people and expect all staff and volunteers to share this commitment.

This position is subject to a criminal records check from the Disclosure and Barring Service (DBS) which will require you to disclose details of all unspent and unfiltered spent reprimands, formal warnings, cautions and convictions in your application form.

Please return your completed application forms electronically to Charlotte Gallimore - pa2ceo@uttlit.com



Registered address:

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Dove Bank

Uttoxeter

Staffordshire

ST14 8DU

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