



Owlcotes Multi-Academy Trust

Chief Finance Officer Application Pack

“Working Together to Achieve Excellence”



Primrose Hill
Pudsey
Leeds
LS28 6AB

info@owlcotesmat.org

0113 8874523

Owlcotes Multi-Academy Trust

Welcome from the CEO

Thank you for your interest in this Chief Finance Officer role with the Owlcotes Multi-Academy Trust. We are a growing, primary school Academy Trust based in Leeds with schools in both West and North Leeds. I have been the CEO since the Trust was founded in 2018 and I am proud to be able to look back on our journey as a Trust so far and see that we have had a number of successes, and I am also looking forward to the next stage of our development.

Owlcotes Trust puts children, families, and school communities at the heart of everything we do. Our philosophy of 'Working Together to Achieve Excellence' underpins every decision made by our fantastic school leaders, school staff, and Central Team, and these values also drive the vision, culture and strategic direction of the Trust.

Owlcotes was initially founded by Pudsey Primrose Hill Primary School and Pudsey Waterloo Primary School, following a number of years of professional collaboration between the two schools, in March 2018. Calverley Parkside Primary School joined Owlcotes in November 2018, Armley Park Primary School followed in December 2019, and Manor Wood Primary School joined Owlcotes MAT in June 2023. Each school in the Trust has continued to improve from their starting point on conversion, and we have a strong track record of school improvement which is driven by our desire to provide the very best education for all of our pupils. We are at the next stage of our development and growth and we are seeking a strong Chief Finance Officer to lead the strategic direction of the finance department of the Trust.

Yours Sincerely,

Lesley West, CEO.



Chief Finance Officer Opportunity

The Owlcotes Multi-Academy Trust Board of Trustees are seeking to appoint a Chief Finance Officer to lead our finance team. This is an exciting opportunity to join a values-driven and ambitious Trust in the next stage of our development. The successful candidate will work closely with the Chief Executive Officer, the Central Team, the Board of Trustees, and school Headteachers to help us achieve our strategic objectives, effectively lead the Trust's finances, and contribute to the strategic direction and future of our Trust. The CFO will have a key role in the Trust Executive Team, contributing to Trust-level decision making and strategies for future growth and development.

The Owlcotes Multi-Academy Trust finance team consists of:

- CFO (vacancy)
- Trust Accountant (full-time)
- Senior Finance Officer (full-time)
- Two (part-time) Finance Assistants.

The CFO will provide leadership to the finance team and work closely with the CEO and Chief Information Officer (CIO) to develop plans for Trust growth and development. This role represents a unique opportunity for an experienced finance professional who is seeking to develop their skills into more strategic aspects of finance in a growing Trust.

The responsibilities for this position will include:

- Effective collaboration with the CEO, CIO and the Board of Trustees;
- Financial oversight of the schools within our Trust and the central team;
- Line management of the finance team;
- Supporting school Headteachers to manage school budgets with rational spending and staffing structures;
- Liaising with the ESFA, DfE, external and internal audit, and other relevant outside agencies;
- Ensuring compliance with financial regulations;
- Regular financial reporting to the Board of Trustees and its finance sub-committee.

The ideal candidate will:

- Be an effective leader and communicator;
- Be proactive in their work and model professional integrity at all times;
- Have experience in a finance role;
- Be appropriately qualified – ideally possessing, or working towards, an accountancy qualification from an accredited provider;
- Have an understanding of the financial framework that Academy Trusts operate within;
- Have an understanding of the principles of public sector spending, in particular how to demonstrate value for money;
- Have a willingness to engage in professional development and training opportunities;
- Possess a positive, solution-focused mindset.



At Owlcotes Multi-Academy Trust we:

- Enable pupils to achieve well, regardless of their starting point;
- Offer an enriched, engaging curriculum and school experience that is accessible to all pupils and inspires creativity and aspiration;
- Preserve each of our school's unique identity to allow school leaders to best meet the needs of their school community;
- Invest in our staff by providing training and professional development opportunities in order to equip staff with the skills required to achieve excellence in their role;
- Foster a friendly, supportive and collaborative professional network of colleagues who share best practice and learn from each other.

Staff are our most important asset and Owlcotes Multi-Academy Trust can offer a range of benefits such as:

- The opportunity to work within a successful and growing Trust, committed to providing the best opportunities for all pupils and staff;
- A friendly and accommodating team of school staff and central team staff;
- The opportunity to lead the financial strategic direction of the Trust;
- Ongoing training and support tailored to the successful candidate's needs;
- An employee benefits and discounts scheme via Perks at Work, including salary sacrifice schemes such as Cycle to Work;
- A generous employee pension scheme.

We believe in investing and supporting our staff to be the best that they can be, as well as giving people ownership of their responsibilities and the autonomy to be proactive. This is a role in which you will get the opportunity to thrive.

Adverts and job descriptions can never provide the full picture to candidates and visits to the central team office are encouraged. Visits to meet the Chief Executive Officer or Chief Information Officer and further discuss this exciting role can be arranged at mutually convenient times during the weeks commencing 8th, 15th and 22nd January 2024. Please contact Joe Wilson, Chief Information Officer, at 0113 8874523 or j.wilson@owlcotesmat.org to arrange a visit.

Successful applicants will undergo an enhanced DBS check prior to employment and will abide by Owlcotes Multi-Academy Trust policies, procedures, and safeguarding and child protection policies.

The deadline for application for this role is Thursday 1st February 2024 at 12 noon.

If you are interested in applying for this role, please see the job description in this application pack and application form on the [Owlcotes Multi-Academy Trust website](https://www.owlcotesmat.org). Applicants can either download the application form, or email recruitment@owlcotesmat.org to request a copy of the application form. **Please send your completed application form to recruitment@owlcotesmat.org.**



Chief Finance Officer Job Description

Post(s) to which directly responsible: Chief Executive Officer

Purpose of post: As a member of the Executive Leadership Team, the CFO will have responsibility for Trust Finance and Business Development. This is an integral role within the Central Team. The CFO will provide advice to the CEO and leadership to the finance team. The CFO will lead on strategic financial planning for Owlcotes schools, as well as lead on preparing for external and internal audit functions. The CFO will ensure efficient production of management accounts and management of school budgets in line with best practice. The role will include financial and business considerations related to trust growth plans including financial risk management.

Responsibilities of the role

Strategic Oversight

- Ensure that Owlcotes Multi-Academy Trust complies with its financial obligations in the Academy Trust Handbook, Academy Accounts Direction and Articles of Association;
- Ensure that the Board of Trustees fulfil their responsibility to maintain oversight of the Trust's finances by producing timely reports and supporting documentation where necessary;
- Advise and support the CEO on all financial aspects of the Trust;
- Attend executive leadership team meetings and support the headteachers and the central team executive leadership on business and financial matters;
- In collaboration with the accountant, lead on the preparation and production of annual financial accounts to comply with statutory requirements;
- Be responsible for the submission of regulatory documentation;
- Ensure that financial procedures and practices are organised effectively, fit for purpose and fulfil regulatory requirements;
- Ensure that financial policies are fit for purpose and fulfil regulatory requirements;
- Analyse financial information for Owlcotes schools and the central team to develop medium and long-term financial planning strategies and business development strategies.

Financial Controls and Management

- Ensure that the Trust's internal and external financial audit functions, control systems and assurance processes are fit for purpose and work effectively and lead on the execution of these functions;
- Ensure that value for money, financial best practice and Trust processes and procedures are maintained in all of the Trust's financial activities;
- Undertake financial and compliance benchmarking to ensure the trust uses its funds wisely;
- To support the finance team with effective procurement;
- Ensure that spending controls set out in the Scheme of Delegation and Financial Management Policy are in place and adhered to;
- Attend meetings and report to Trustees including presenting a CFO report, management accounts, accompanying narratives and robust advice to the Finance, Risk and Audit Committee (FRAC) and full Board of Trustees;
- Support the FRAC to effectively fulfil its risk management, audit and scrutiny functions;
- Ensure the Board of Trustees fulfils its statutory obligations to the DfE, ESFA, Companies House and other regulatory bodies;
- Support the Board of Trustees to produce annual end-of-year reports and support external auditors to produce annual accounts reports;
- Manage the year-end process including engagement with external audit partners and ensuring the annual audited end of year report is prepared by the statutory deadline;
- Lead on internal financial audits to ensure compliance with procedure in all finance transactions.

Financial Planning

- Prepare annual budgets with Headteachers for the Board of Trustees to review and approve;
- Prepare long term budgets for Owlcotes schools and the Central Team, including identifying areas of risk and actions to mitigate risk;
- Support the CEO and Headteachers to ensure Owlcotes schools maintain healthy reserves and identify necessary spending for MAT growth;
- Swiftly identify any potential areas of financial deficit and take robust action to mitigate any identified risk;
- Ensure budget forecasts are accurate, based on realistic assumptions, and account for medium and long term planned spending;
- Evaluate assumptions programmed into budget forecasts to ensure they remain accurate and realistic;
- Identify funding streams available to the Trust and its schools and assist in the preparation and production of funding applications.

Line Management

- Line management responsibility of members of the finance team, including leading on performance reviews;
- Identify own professional development needs and professional development opportunities for members of the finance team;
- Model exceptional financial best practice and ensure compliance with financial policy, controls and systems at all times.

Physical Conditions

This post is currently based at the Owlcotes Multi-Academy Trust central office, on the premises of Pudsey Primrose Hill Primary School, and the Owlcotes Multi-Academy Trust finance office, on the premises of Armley Park Primary School. During the course of your employment, you will be required to undertake your duties at Owlcotes Multi-Academy Trust schools.

This post is subject to an enhanced Disclosure and Barring Service check.

Owlcotes Multi-Academy Trust and its schools operate a non-smoking policy.

Relationships

The post holder will be required to work flexibly to deliver an effective service. There will be regular contact with school pupils, colleagues, and other members of staff, parent/carer(s) and other external stakeholders. The post holder is expected to contribute to the overall ethos, work and aims of the school and Trust.

Economic Conditions

Nature of Appointment: All year-round position. This is a permanent appointment.

Salary: Starting salary: £55,000, within the pay range £55,000 - £60,000.

Hours: 37 hours per week, Monday - Friday.

Annual Leave: Entitlement to annual leave will be calculated on a pro-rata basis. In the school summer holiday period, a maximum of two week's annual leave will be able to be taken.



Chief Finance Officer Employee Specification

Detailed below are the types of skills, experience and knowledge that are required of applicants applying for the post. The 'Essential Requirements' indicates the minimum requirements, applicants lacking these attributes will not be considered for the post. The 'Desirable Requirements' are additional attributes to enable the applicant to perform the position more effectively. They are not essential, but may be used to distinguish between acceptable candidates.

SKILLS	<i>Essential</i>	<i>Desirable</i>	<i>MOA</i>
Excellent level of written, oral and communication skills.			A/I/T
Able to communicate effectively with a wide range of people including sensitive and complex information.			A/I
Able to produce and present reports and data.			A/I/T
Able to establish and maintain accurate records using both manual and electronic systems.			A/I
Able to accurately enter/retrieve data information from information systems.			A/I
Able to contribute to the continued development of the Trust, including reviewing and refining systems and processes.			A/I
Able to prioritise your own and the finance team's work to meet conflicting deadlines.			A/I/R
Able to work in an organised and effective manner and direct the work of others.			A/I
Able to prioritise and work methodically to meet external deadlines.			A/I/R
Able to support the Executive Team with strategic planning and setting long term budgets.			A/I

KNOWLEDGE/QUALIFICATIONS	<i>Essential</i>	<i>Desirable</i>	<i>MOA</i>
Knowledge of relevant Academy Trust financial regulations.			A/I/C
GCSE in English and Maths (Grade C or above, or equivalent).			A/I/C
Higher Education degree or relevant finance qualification (or undertaking a degree or finance qualification).			A/I/C
Accountancy qualification from accredited provider.			A/I/C
Full UK Driving Licence and own a vehicle.			C



Chief Finance Officer Employee Specification

EXPERIENCE	Essential	Desirable	MOA
Experience of dealing with complex queries from a wide range of people.			A/I
Experience of working in partnership with others to deliver work to set deadlines.			A/I/R
Experience in an Academy/ the education sector			A/I
Experience of being accountable for financial resources.			A/I
Experience of preparing for annual financial audit.			A/I
Experience of ensuring compliance with statutory financial regulations.			A/I
Experience of managing and developing staff.			A/I
Demonstrate a track record of effective team leadership.			A/I/R
Experience of participating in teams and working on own initiative.			A/I/R
Experience in the use of the Microsoft Office package.			A
Experience in the use of financial management and budget planning systems.			A/I
Experience of extracting, analysing and presenting data from a range of information sources.			A/I

BEHAVIOUR AND OTHER RELATED CHARACTERISTICS	Essential	Desirable	MOA
Will abide by Owlcoates Multi Academy Trust policies in the duties of the post and as an employee of the Trust.			A/I
Willing to carry out all duties having regard to an employee's responsibility under Owlcoates Multi-Academy Trust Staff, Health and Safety, and Child Protection and Safeguarding policies.			A/I
To display a responsible and cooperative attitude to working towards the achievement of the Academy Trust's aims and objectives.			A/I/R
An ability to respect sensitive and confidential work.			A/I
Commitment to own personal development and learning.			A/I/R

MOA: Method of Assessment

(A: Application Form, I: Interview, T: Interview Task, C: Certificate, R: Reference)



About the Owlcotes Multi-Academy Trust

Owlcotes is a Leeds-based, primary Multi-Academy Trust, founded in March 2018 by Pudsey Primrose Hill Primary School and Pudsey Waterloo Primary School, with a network of five primary schools and two central team offices in Leeds. At Owlcotes Trust, we believe that each school that joins us brings something unique and important to the Trust, which benefits all other schools within the MAT.

We put children at the heart of everything we do and aim to ensure that all children within the Trust have access to ambitious learning opportunities and experiences not only within their own school but also in partnership with other schools in our trust. We focus on providing the highest quality of education for all our pupils so that our schools are places of excellence, meeting the needs of our diverse communities. Every school in our Trust is unique, and we firmly believe in schools having their own identity and individuality, underpinned by common principles of holistic learning environments and professional collaboration. Our schools work closely together and we have a genuine desire to provide an excellent education for all pupils. We strive to achieve this by inspiring innovation, creativity and aspiration through an enriched curriculum.

We have a network of collaborative learning communities across the Trust, and we work to develop and share good practice within our philosophy of 'Working Together to Achieve Excellence'.

The Owlcotes Central Team provide a raft of support for all schools, offering financial management and oversight; premises development; compliance monitoring; recruitment support and HR functions. This enables school leaders time to focus on improving the quality of education in their own schools. We have also built a Trust Development Team of accredited SLEs, trained moderators and NLEs to provide school improvement support to schools within the Trust.

The CEO of Owlcotes Multi-Academy Trust is Lesley West, a National Leader of Education with many years of experience in primary school improvement.

