



Finance Director (CFO)

Candidate Pack

Welcome Letter from CEO

Dear Applicant,

Thank you for your interest in this new post of Finance Director (CFO) at the Learning Academy Partnership (South West).

Our Trust was established in 2012 from its origins as a Primary National Support School and has grown to 8 academies with St Michael's CofE Academy (New Free School due to open September 2021), with others in the pipeline. The Trust has a Church of England foundation which is fully inclusive of both Church and Community schools.

The Vision and Core Purpose of our Trust is to Transform Children's Lives by working together as a values-led family of exceptional schools, delivering an entitlement to a world-class education across all our local communities so that every child, regardless of their background or context, can flourish. Our Trust, without exception, delivers that promise. We are rightly proud of our leading position in the National DfE Multi Academy Trust performance tables.

Our core values 'Collectively Empowering Excellence', guide the way that we work together and underpin all that we do. You will be joining a Trust in a healthy financial position and with an experienced and highly supportive team who are passionate about delivering an exceptional education for all children and without exception will always put children at the heart of our decision making.

This is an exciting opportunity for an ambitious, talented, finance professional that has strong business and commercial acumen, to join the Trust as we prepare for the next stage in our growth. You will be a key member of the Trust Leadership Team, be driven by a moral purpose and the satisfaction of making a difference to improving children's life chances. You must have a sense of humour, emotional resilience and the leadership skills to help shape and steer the development and success of the Trust during both a period of change and continued future success.

There is no ceiling to our ambition and this role presents a unique opportunity for the successful candidate to develop the role and scale up the Finance Team, as well as gain real personal and professional satisfaction to realise future career opportunities as the Trust grows.

Yours sincerely,

Lynn Atkinson
Chief Executive Officer



Learning Academy Partnership

The Learning Academy Partnership (South West) is a highly successful Multi-Academy Trust, with a Church of England foundation, established in 2012. The CEO and founding Headteacher is a National Leader of Education who, alongside, a talented Trust Team, works extensively to improve outcomes for all children by delivering and supporting school improvement across the South West. The Trust is recognised by the Regional School Commissioner's office as a strong Trust and School Improvement Partner. The financial health, management and governance of the Trust is good.

In 2018 and 2019 (source DfE MAT Performance Tables), the Trust was ranked in the Top 10 highest performing Trusts nationally for the progress that all pupils make. The Trust is currently ranked as Number 1 Trust in the country for the high attainment of disadvantaged pupils at 85% compared to the national average of 71% for non-disadvantaged pupils.

As established system leaders we provide a huge amount of support for schools beyond our own Trust through leading:

- All Saints Teaching School.
- Significant DfE funded regional SSIF projects including Maths (supporting 40 schools) and Phonics (supporting 60 schools); Tailored Support Programme and the DfE School Improvement Offer.
- Ilsham National English Hub (engaging 200+ schools, supporting 20 intensively).

Our core purpose: to improve the life chances of all children; particularly the most disadvantaged.

The Trust operates 8 primary schools in SW England with a pupil capacity of 2011 (excluding nursery provision):

- Ilsham Church of England Academy
- Ellacombe Church of England Academy
- Warberry Church of England Academy
- All Saints Marsh Church of England Academy
- All Saints' Thurlestone Church of England Academy
- Charleton Church of England Academy
- West Alvington Church of England Academy
- Dunsford Academy
- Dartington Church of England Primary (currently management partnership)
- St Michael's CofE Academy (New Free School due to open September 2021)

Impact of the Trust

- **The Learning Academy Partnership is the Number 1 Trust** in the country for the percentage of disadvantaged pupils achieving the expected standard.
- The Trust has closed the gap for disadvantaged pupils in all its schools in coastal towns.
- All Schools in the Trust have closed or are closing the gap for disadvantaged children.

TOGETHER WE EMPOWER

Learning Academy Partnership *continued*

- Top 10 Trusts Nationally (3rd ranking) – for progress of disadvantaged pupils – in both Reading and Maths.
- Top 10 Trusts Nationally (8th ranking) for Reading and Maths Progress of All pupils.
- Top 10 Trusts Nationally for Maths Progress (2nd year running).
- Top 10 Trusts Nationally for Reading Progress of all pupils (2nd year running).
- All schools within the Trust improved or sustained good attainment since 2018.
- Writing progress above average.
- Maths progress well above average.
- Reading progress above average.
- 91% of pupils passed the Year 1 Phonics screening 2019 compared to 70% nationally.

Transformation at School Level:

- All schools have significantly improved pupil outcomes and pupil progress.
- All Schools have achieved a 'Good' Ofsted outcome since joining the Trust. Including schools that have improved from previous Ofsted grades of Special Measures or Requires Improvement.
- Prior to joining the Trust Ellacombe CofE Academy was consistently the bottom performing school in Torbay and in

the bottom 1% of all schools nationally. It continues to serve a deprived community in a coastal town. It is now the top performing school in Torbay for disadvantaged pupils (91%) and second highest performing for All Pupils.

- Ilsham CofE Academy is the top performing school for all pupils (92%) in Torbay and second for disadvantaged pupils – again it serves the coastal town.
- Thurlestone CofE Academy is the third top performing school in Devon, out of 379 schools for attainment in Reading, Writing and Maths.
- All Saints Marsh CofE Academy was in RI when it joined the Trust in 2015; it is now a Good school and consistently in the top ten performing schools.
- West Alvington SIAMS 2019 Good.
- Ellacombe, newly designated Church school, achieved Excellent in its first inspection in 2019.
- We have long been recognised as a strong academy sponsor with a strong school improvement track record and capacity for growth by the Regional Schools Commissioner (RSC) and we are strategic partners in the newly formed Teaching School Hub.





Learning Academy Partnership *continued*

Additional Information

Ilsham English Hub – www.lapsw.co.uk

As a result of consistent phonics and reading outcomes we have been designated one of the 33 National English Hubs. We work across Devon, Torbay, Plymouth and into Somerset.

We have a remit to support 400 schools to improve early reading in the South West.

All Saints Teaching School Alliance – www.astsa.org

As the National Support School, Ilsham CofE Academy was awarded Teaching School status in 2014. The Trust delivers the TS. During 2018-19 we were successful in funding for a number of DfE projects:

- 490K SSIF 1 funding to Close the Gap in KS2 Maths. This project involved 6 TSAs, over 40 schools and spanned 4 Local Authorities.
- £250k Phonics.
- £5K Maths Hub funding to deliver the Maths Hub EYFS Maths project in the South Devon Area.
- £10K Equality and Diversity in Leadership funding to support local schools in creating and growing more female leaders.

In addition to the funded projects, ASTSA continued to provide National Leader of Education support, leadership support through deployment of SLEs and a comprehensive CPD programme.

School to School Support

The Trust works extensively across a number of DfE funded projects to deliver school to school support and improve outcomes for children across the South West. During 2018-19 National Leaders of Education (NLEs) from the Trust and the Teaching School Lead provided school to school support through the DfE School National Improvement. Specialist Leaders of Education have been deployed as part of school to school support across the South West. We are part of the Tailored Support Programme Fund and work with South West schools to support recruitment and retention as well as the development of Early Career teachers.

School Direct: Teacher Training

2018-19 cohort all completed the programme graduating with at least Good. 9 trainees were recruited for 2019-20.

Vision and Core Values

Our Vision: To Transform Children’s Lives

Core Purpose: To develop a “values-led” family of exceptional academies that always puts children first. Where learners excel and communities are enriched so that the life chances of more and more children are improved.

Our Core Values: Collectively Empowering Excellence

Collectively

We are one team and agree to work as one family

Empowering

We invest in each other and our communities

Excellence

We champion excellence and equality for all and in all that we do

Our Six Principles of Excellence

- **Priority – Children First** – In every action we take and decision that we make. For our children, we collectively empower excellence.
- **Aspirational Expectations** – A culture where every child will succeed.
- **Excellence in Teaching and Learning** – Excellent, passionate Teachers transform children’s lives. For our children, we collectively empower excellence.
- **Professional Development – Investing in People** – A commitment to world-class, bespoke, continuing professional development. For our staff, we collectively empower excellence.
- **Distinctiveness** – We embrace, encourage and celebrate the uniqueness of each of our academies, recognising the context of the community that it serves and the curriculum that it offers to meet those needs. For our communities, we collectively empower excellence.
- **Leadership with Vision and Efficacy** – Working together, we deliver and achieve much more than we could ever do individually. Collective expertise, shared responsibility, accountability and financial efficiencies, add value and improve outcomes for children. For our Leaders, we collectively empower excellence.

Our motto is ‘**Collectively Empowering Excellence**’, a philosophy that underpins all that we do.

We achieve this by promoting, sharing and developing outstanding practice across our academies. Collectively Empowering everyone to achieve Excellence.



Leading Academy Partnership



Job Title:	Finance Director – (Chief Finance Officer)
Grade:	Competitive
Location:	Based at Zealley House, Newton Abbot
Hours of Work:	37 hours per week, full time
Reporting To:	Chief Executive Officer (CEO) Working with Trust Lead for Governance & Compliance
Responsible To:	Chief Executive Officer & Trust Board
Responsible For:	Trust Finance Team (Trust Finance manager, Payroll Manager and Finance Assistants)
Start Date:	September 2020

Job Description: Finance Director (CFO)

Main Purpose of the Post

The **Finance Director (CFO)** will be a key player in improving children's life chances by helping to drive the best possible outcomes for children through effective leadership and development of the Trust's finances.

Always putting children first and upholding the vision, values and 6 principles of the Trust.

The Finance Director will lead the promotion and delivery by the organisation of good financial management to support the CEO/Accounting Officer (AO) and the Trustees, in accordance with the Education Skills Funding Agency (EFSA) Academies Financial Handbook (AFH), to ensure regularity, propriety and value for money.

This is a key Senior Leadership Role, working alongside the Trust Lead for Governance and Compliance, contributing to the Trust Executive Leadership Team and strategic direction of the Trust and its academies. The Finance Director will have delegated responsibility for the trust's financial procedures and the role of Chief Finance Officer (CFO).

The role is pivotal in ensuring that our academies have the resources and services that truly support outstanding educational provision for all our pupils.

You will welcome working in a collegiate and inclusive organisation and you should have high levels of both emotional intelligence and resilience.

The Learning Academy Partnership, Trust Vision and Core Values will be your foundation stone and driver.

Specific Duties

- Provide high quality strategic leadership and management for all aspects of the Trust's finances to enable the Trust to run smoothly, efficiently and effectively in the delivery of the Trust's core aims.
- Undertake the role of CFO to whom responsibility for the Trust's detailed financial procedures are delegated. The CFO will play both a technical and leadership role. As CFO in line with the AFH, you will be responsible for ensuring compliance with the statutory and legal requirements of the Trust ensuring effective processes and financial systems are developed and implemented in the Trust and across all academies.
- Responsible for the Financial Management of the Trust in all aspects relating to strategic planning and budget management.
- Leadership of the finance and business function, running it as a highly competent, efficient service.
- Improve and rationalise group wide procurement, achieving improved economies of scale and significant savings.
- Improve utilisation of academy facilities to allow money generation to drive excellent educational outcomes for children.
- Support managers and the development of the wider business management of the Trust including but not limited to: facility and property management; health and safety; procurement of goods and services, payroll, project development, English Hub and other Department for Education (DfE) grants, catering and IT.
- Oversee the long-term replacement programme of assets and the identification of funding and bidding opportunities.

Job Description *continued*

- Financial oversight of the strategic development plans for the Estates and ICT infrastructure to reflect both capital depreciation and improvement needs.
- Ensure the Trust Catering provision maintains viability producing profit and loss statements.
- Promote the highest standard of the Trust's business ethos – 7 Principles of Public Life – the Nolan Principles.

Key Responsibilities include, but are not limited to:

- Delivering on the Trust Vision and growth ambitions, working in partnership with leaders to deliver outstanding education, in academies serving their local communities.
- Providing leadership and professional management of financial and business operations, driving a culture of continuous improvement in all operational areas.
- Contributing to strategy and policy development to support the Trust's aims and objectives.

Budgets and Budgetary Control

- Ensure effective financial processes and systems.
- Ensure accurate monthly management accounts and budget monitoring reports, explaining all significant variances to relevant stakeholders and highlighting to the CEO/AO, areas requiring attention to ensure the Trust fulfils its statutory requirements.
- Oversight and preparation of accurate and timely financial reports and returns as required by funding bodies, government departments and Companies House.
- Ensure that financial planning is informed by the curriculum and staffing needs of the Academies and that future changes are catered for.
- Proposing revisions to the budget as required.
- Develop financial benchmarking which measures and reports on the success of the Trust.
- Oversight of the Trusts PS Financials accounting system, maintaining the charts of accounts and system parameters.
- Monitoring financial arrangements, ensuring the provision of

value for money across the Trust and researching opportunities for efficiency savings where possible.

- Recommend and manage Trust reserves, day to day and strategic deposits to ensure maximum returns for the Trust within the policy constraints.
- Development of Trust wide guidance notes, as required, that comply with AFH, Trust finance policies and procedures and Scheme of Delegation.
- Manage all aspects of VAT accounting and reporting.

Risk Management

- In accordance with the AFH ensuring that appropriate risk management processes and risk register are maintained and monitored, reporting to the Trust Executive Team and Trustees.
- Ensuring the Trust has appropriate insurance cover is in place and arrangements are regularly reviewed and monitored.

Development

- Oversee, monitor and support Trust Executive Team and Project Leads with KPIs and budgets for appraisal of opportunities and seek to generate income for the Trust through carefully considered letting, catering opportunities from school facilities.
- Management of the due diligence process involved with new academies joining the Trust and partnerships.
- Income Generation- Identification of new sources of income for the Trust and academies and ensuring that appropriate steps are taken to access the funds.
- Act as the initial point of reference for commercial and financial issues, as well as participating in the management of major Academy projects, which may include potential growth, as required.

Procurement

- Develop, monitor and advise on the Trust financial and procurement policies and practices to ensure timely contract procedures and Value for Money (VFM).





Job Description *continued*

- Monitoring all contracting and procurement activities to ensure the Trust is fully compliant and services ensure best value for money.

Audit

- Liaise with auditors and external bodies and implement all audit requirements and recommendations throughout the Trust.

Payroll

- Monitor the trust's in-house payroll process including compliance with Audit and reporting requirements to HMRC, TPS and LGPS as required.
- Oversee the role and responsibilities of the designated Pension Liaison Officer for TPS and LGPS.

Line management

- Manage the recruitment, performance management, appraisal and professional development for Finance/Payroll staff.
- Ensuring succession planning/emergency capacity and business continuity is in place.

General Responsibilities

- Promote and model the core values and 6 principles of the Trust.
- To be able to effectively communicate and present to a variety of audiences.
- Lead and support difference and ensure equal opportunities for all.
- Contribute to the overall ethos/work/aims of the Learning Academy Partnership
- Establish constructive relationships and communicate with other professionals.
- Attend and participate in relevant meetings and other events as required.

- Participate in training/learning activities and performance development as required.
- Recognise own strengths and areas of expertise and use these to advise and support others within the organisation.
- To be a reflective practitioner active in the pursuit of their own CPD and that of others.

Expectations

1. As appropriate, to the postholder's duties must be carried out in compliance with the following:
 - Trust Policies and Code of Conduct
 - Academy Financial Handbook
 - Company and Charitable Law
 - Financial Regulations
 - Health and Safety at Work Act (1974) (and subsequent Health and Safety legislation)
2. To work flexibly as required.
3. To maintain confidentiality of the Trust's affairs.
4. To work at all times within Code of Conduct, GDPR and the Safeguarding Policy.
5. Participate, support and comply with Trust arrangements for responding to emergencies and/or business interruptions.
6. These duties and responsibilities should be regarded as neither exclusive nor exhaustive as the postholder may be required to undertake other reasonably determined duties and responsibilities, commensurate with the grading of the post, without changing the general character of the post.
7. To put all children, in the Trust, at the core of all decisions and actions.
8. To be an ambassador for the Learning Academy Partnership
9. To uphold the vision, values and ethos which underpin the Trust and support how we work as a single organisation.

Person Specification: Finance Director (CFO)

Attributes/ Requirements	Essential	Desirable
Education, Qualifications & Training	<ul style="list-style-type: none"> • Recognised accountancy qualification e.g. CIMA, ACCA, CIPFA or equivalent • A degree or similar level of qualification in accounting, business management or a related discipline • 5 GCSE's Grade A-C (or equivalent) to include Mathematics & English 	<ul style="list-style-type: none"> • A further education related business management qualification • Proven technical financial ability and relevant experience; background in Multi Academy Trust Finance and/or education • Knowledge of PS Financials
Experience/ Skills & Abilities	<ul style="list-style-type: none"> • A successful track record of effective financial management, financial analysis, risk management and financial operational leadership • Knowledge of statutory requirements, procedures and regulatory requirements relating to education • Understanding of Charity Law to ensure Trustee Board is effective and fulfils its statutory responsibilities • Ability to think creatively and be solution focussed • The ability to use and interpret and present complex data to measure, benchmark, evaluate and account for the Trust's financial performance • Excellent organisational skills • Evidence of the ability to develop, delegate and empower others. • Excellent communication, presentation and interpersonal skills • Evidence of developing and maintaining highly effective relationships with a wide range of stakeholders • Evidence of being a Team player • Experience of financial information systems • Supportive of the Christian ethos underpinning LAP • Commercial awareness • Working in an educational setting • Knowledge and experience of tendering process and managing contracts • Cash flow forecasting • Preparing schedules for Year End Statutory Financial Statements • VAT return preparation • Previous line management experience • Preparation of management accounts and forecasts • Budget Preparation • Use of computerised accounting packages • Analytical and problem-solving skills • Excellent communication skills, verbal and written • Excellent Presentation Skills • Excellent organisation skills and strong attention to detail • Disciplined and organised with the ability to work under pressure 	<ul style="list-style-type: none"> • A successful track record of more than 5 years in a senior finance role • In depth knowledge of statutory requirements, procedures and regulatory requirement relating to education • Experience of Charity Law to ensure Trustee Board is effective and fulfils its statutory responsibilities • Experience of project management • Experience of Local Government and Teachers Pension Scheme • Strong commercial awareness • Experience of school/academy estates management and development management of estates strategies • Considerable experience and knowledge of the procurement of services • Excellent IT skills across a range of applications, specific software and school management systems • Payroll experience • Working in a finance office environment • Comprehensive knowledge and understanding of finance systems and processes
Personal Qualities	<ul style="list-style-type: none"> • Emotional Intelligence • Confident • Emotional Resilience • Be a person of integrity • Sense of Humour • Team Player • Be able to maintain confidentiality • Listen to, reflect and act on feedback • Have a positive attitude to personal development and training • Be able to confidently address groups of people and individuals • A positive, visible and approachable role model to others • Enjoy working in an educational context • A clear sense of perspective and a positive 'can do' approach • Evidence of seeing tasks through to completion • Highly motivated and skilled, ambitious • Creative thinker 	

The successful applicant will need to be willing to travel and hold a current full driving license

AACADEMICIS

How to apply:

If you wish to discover more about this exciting opportunity, need any further information or you wish to have an informal discussion, please contact our recruitment partner at **Academicis**:

Caroline Olsen: colsen@academicis.co.uk – 01223 907 979 /07500 889 504

In addition, you will need to submit a supporting statement, setting out your vision, relevant experience, skills and competencies.

Please email your application to: colsen@academicis.co.uk

Closing date: Noon, Monday 8th June 2020

Shortlisting date: Tuesday 9th June 2020

Interviews: Friday, 12th June 2020

We look forward to hearing from you