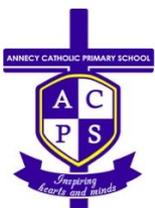




A Trust where every child is known and loved



CHIEF FINANCE OFFICER  
RECRUITMENT PACK

# Welcome!

Dear Applicant

Thank you for your interest in the post of Chief Finance Officer (CFO) which we are particularly excited about advertising for. This unique and important post has the potential to make a very real difference and lasting impact on the future life-chances of the children entrusted to our care.

The Bosco Catholic Education Trust, was formed in 2016 and is now at a crucial stage of its future development, supporting and facilitating the success of a growing number of Catholic schools across Sussex. In this short period of time we have achieved a lot and are now looking to appoint a qualified accountant to join our fantastic team. For us as a Trust and family of schools, finding the right person isn't just about their experience and qualifications, we are looking for someone who really buys into our ethos, work ethic and is a great people-person. High levels of emotional intelligence are a must!

The schools in Bosco CET are all vibrant, diverse and welcoming communities. They share a common ethos and expectation; setting high standards and never settling for second-best. Your role as CFO, is imperative in helping these schools and the Trust to realise their ambitions for the future.

We recognise that to find the right person we need to be flexible and creative. Whilst we know we need a CFO full time in the future, we'd be happy to consider anyone looking to take this role on, on a part-time basis or as a secondment within their existing job. As a minimum we believe we'd need you for at least two days a week. Flexible working is also possible, however investing in people and serving the schools within our Trust does of course mean we can't do this entirely remotely.

Bosco CET has been named as the Diocesan multi-academy trust for Sussex, and whilst our family will soon consist of eight schools we expect others to join in the future. There is an exciting range of activities across the Trust, including the leading of the Sussex Maths Hub from St Paul's, Initial Teacher Training, Professional Development Programmes and school to school support. These roles and activities lead to great innovation, opportunities and collaboration.

The CFO will work alongside myself as CEO and our Chief Operations Officer, Jill Alcorn, on behalf of the Diocese and Trust Board. We have a fantastic education team and great administrative support for our work too.

We believe it is imperative to invest in our staff and cherish their work. This would apply to you too. So, if you think this might be the job for you, please do get in contact for a chat. We'd love to hear from you.

David Carter  
CEO, Bosco CET





## BOSCO CATHOLIC EDUCATION TRUST

St John Bosco, founded the Salesian Order in the 19<sup>th</sup> Century. He had a profound and compelling vision for education, reaching out to some of the most vulnerable, disaffected and uncared for children in Turin and surrounding areas. He provided them with faith, hope and love; giving them opportunities and a future that no one else had afforded them. Don Bosco spoke about the need for children to be 'known and loved'. The diocesan schools of Sussex chose Don Bosco as the patron of the multi-academy trust as it was felt he encapsulated all that we cherished in Catholic education, providing us with a model of leadership and education which would sustain and nourish us on the exciting journey ahead.

The Bosco Catholic Education Trust (BCET) opened in April 2017 with St Mary's and St Philip Howard Catholic School (SPH), Barnham. Annecy Catholic Primary School joined in February 2019, St Joseph's in September 2020 and St Paul's in January 2022. We look forward to welcoming three further schools between now and the end of the year, taking our family of schools to eight.

As in other areas of the Diocese of Arundel & Brighton, Catholic schools are working collaboratively, cross-phase to develop an exciting vision for Catholic Education which is fit for the future. Within Sussex, there are 36 schools: 30 primary and 6 secondary. Over time it is anticipated that other schools within Sussex will join BCET, to help develop Catholic Education across the South Coast and beyond.

As CFO, you'll play a hugely important role in helping to shape the vision and direction of the Trust, knowing that first and foremost as senior leaders we are here to serve, not to be served. We are here to enable others and facilitate their success; doing whatever it takes to ensure that children get the very best possible deal from their education in any one of our Catholic schools.

## CHIEF FINANCIAL OFFICER

HAY GRADE D (£60,314 - £64,214 PRO RATA), commensurate with experience.

Bosco Catholic Education Trust is looking to appoint an ambitious, hardworking and well-qualified Chief Finance Officer to work with schools across Sussex.

Whilst we require a full time CFO, we ultimately want to appoint the right person. If you aren't at present able to commit to full time working for the Trust we would be happy to consider part-time or flexible working, including secondments, should your current employer be supportive.

If you want to work with wonderful staff, students, and a forward-thinking leadership group, this is the job for you. We are always striving to improve and we'd love you to be part of this journey.

- Bosco Catholic Education Trust is the diocesan Trust for Catholic schools in Sussex.
- There are currently five schools in the Trust (2 secondary and 3 primary) however there are three more primary schools about to join.
- Schools within the Trust are all Good or Outstanding, collaborate well and have a strong track-record of school improvement.
- We have a central team consisting of a Chief Operations Officer, Education Team, Administrative Support and CEO.
- Our Trust Board is experienced, capable, strategic and offer excellent support and challenge.

Bosco CET is an equal opportunity employer and is committed to the safeguarding and protection of children and individuals. This post is subject to a DBS Enhanced Disclosure.

### HOW TO APPLY

Please return the application form with a supporting letter (maximum 2 sides of A4) addressing the following points to Jacqui Inglis at [jinglis@sphcs.co.uk](mailto:jinglis@sphcs.co.uk).

- Why you would like to be our next Chief Finance Officer.
- How your skills, experience and prior impact make you a good candidate.
- Why you would like to work with Bosco CET and what would you bring to our Trust.
- How we can support and nurture you in your development.

**Closing date for applications: 9am on Monday 4 April 2022**

If you would like to discuss your application or visit us prior to applying, please contact me on 01243 558205 or [dcarter@boscocet.org.uk](mailto:dcarter@boscocet.org.uk)



# JOB DESCRIPTION: CHIEF FINANCE OFFICER

## PURPOSE OF THE ROLE

The role of Chief Finance Officer (CFO) is to provide high quality leadership and management of the Trust's financial functions, in order that the Trust can run efficiently and effectively in delivering its vision, aims and objectives.

The CFO will be a member of the Trust Central Team (TCT) and work with the Board of Trustees, Chief Executive Officer (CEO), Chief Operations Officer (COO), Headteachers, leadership teams and Local Governing Committees (LGCs). The post holder will be responsible for managing the current financial position and to establish the vision for the future financial management of the Trust. The post holder will also:

- Contribute to the Board's strategic decision making, whilst taking advantage of economies of scale by seeking to centralise contracts and rationalising the accounting function as appropriate to the Trust's present and future structure
- Ensure that sound and appropriate financial governance and risk management arrangements are in place across the Trust, that budgets are prepared and monitored and that annual accounts are delivered in accordance with the Academies Financial Handbook, the EFSA guidelines and with all statutory requirements
- Lead the promotion and delivery (by the whole organisation) of good financial management so that public money is safeguarded at all times and used appropriately, economically, efficiently and effectively
- In common with the leadership teams, be expected to work outside normal office working hours when necessary to ensure that Trust's needs are met.

## RESPONSIBILITIES

- Maintain a secure overview of the management of all financial issues within each of the Trust's academy schools and college
- Uphold good governance and ethical behaviour including good accounting practices in the finance function and ensure the Trust upholds good accounting, reporting and internal control systems
- Ensure the financial sustainability of the Trust by providing efficient assistance to the CEO, the Board and Headteachers regarding all aspects of financial management within the Trust
- Keep the CEO and the Board up to date with the latest Education and Skills Funding Agency (EFSA) changes and other statutory guidance, briefing as required
- Advise the CEO and the Board on all matters relating to the financial strategy, on the impact of their decisions on the financial position of the Trust and on strategic matters, within the framework for financial control determined by the Board
- Write the Annual Report and prepare consolidated financial statements in the statutory format specified by the EFSA, Companies Acts and Charity Commission for auditing by the external auditors. Arrange a timeline and detailed checklist of work to be carried out inhouse and by the external auditors to ensure the audited statutory accounts are filed with the EFSA by the required deadline (usually 31st December)

- Liaise with external regulators such as the EFSA/DfE, Charity Commission, Companies House, external auditors and internal auditors as required
- Authorise and maintain the Risk Register and attend the Board's sub-committee for Finance, Audit & Risk (FAR) Committee
- Draft, review and/or develop Trust policies, processes and procedures to ensure compliance with various external regulations including filing deadlines regarding VAT, PAYE, EFSA, DfE, HMRC, Charity Commission and Companies Acts
- Maintain a strategic financial plan including a 3/5 year budget plan for the Trust and ensuring these are in place for the academies and college
- Assist the CEO with setting the Trust budget. Support CEO and Headteachers in setting and managing their budgets, thereby enabling the Trust schools and college to deliver their curriculums in a cost-effective manner.
- Provide budgetary advice regarding impacts to budget such as staffing increments, Free School Meals, calculating additional funding High Needs Funding etc.
- Develop checklists for month-end reports to ensure they are prepared on a reliable and consistent basis
- Prepare the monthly and ad-hoc management accounts for all Trust entities, sharing with the CEO and Chair of the Board
- Advise the CEO and the Board if fraudulent activities are suspected or uncovered
- Develop and maintain the in-house Finance Manual that sets out the Trust's operational procedures governing the Trust, combining best practice with the latest Accounts Direction issued by the EFSA
- Provide support, guidance and leadership to any staff (with financial responsibility) in any of the Trust's individual settings as required
- Attend and present at relevant meetings as required (e.g. Full Board, FAR subcommittee, LGCs) to maintain the presence of the finance function and ensure broader financial aspects of key decisions are fully considered and communicated
- Support or lead financial and operational risk assessments and assistance with implementation of appropriate safeguards
- Receive, analyse and interpret financial reports, communicating findings in a simplified manner when necessary
- Research, lead and advise the CEO and Headteachers on additional funding, revenue/income opportunities and additional business opportunities
- Prepare appropriate bids or tender documents for identified additional funds or grants
- Maintain effective systems of internal audit control i.e. cooperating with, initiating and managing audit procedures
- Liaise with the company accountants and the Trust's audit officers and internal scrutiny providers
- Undertake 'due diligence' on future Trust and academy/ college initiatives and growth plans
- Execute the generic duties of a Trust senior leader

## SPECIFIC AREAS OF RESPONSIBILITY

### Budgets/Budgetary Control

- Oversee the preparations of an annual draft budget plans (for each LGC, academy and the college) for consideration by the Board's FAR sub-committee and then ratification by the full Board of Trustees before the start of each relevant financial year
- Monitor expenditure and reporting to the CEO regarding income and cash flow against the approved budget and submit reports on the college and each academy's financial position to each FAR sub-committee meeting
- Approve virements within the delegated financial limits and report such approvals to the FAR sub-committee
- Review any virements required for any academy/ college budget and recommend these to the CEO and FAR sub-committee for approval if appropriate
- Ensure compliance with PAYE, NI, VAT and other relevant legislation

### Internal Audit

- Resource and maintain an effective internal scrutiny function
- Ensure the production of internal termly audit reports on behalf of the Board, together with any recommendations for improvement
- Ensure internal reports are shared with the Board, FAR sub-committee, CEO, Headteachers and LGCs
- Perform quarterly 'Health Checks' on the finance systems used by the Trust academies and college

### Trust Development

- Work with the CEO and COO to review all current systems and procedures, identifying potential areas for improvement
- Work with the Board, CEO, COO, Headteachers, staff and LGCs to identify sources of additional funding to support the Trust's programmes and development
- Play an active role in managing any relevant changes e.g. System changes, Software upgrades, staff reorganisation

### Liaison and Communication

- To maintain an up-to-date electronic diary, weekly/monthly overview to ensure organisation of own diary is communicated with key staff across the Trust
- To establish methods of liaising with COO to ensure HR and Finance teams are working in partnership
- To attend and contribute to leadership meetings when appropriate
- To present to different stakeholders i.e. Trustees, Local Governors, Headteachers, Auditors and Accountants
- To communicate effectively with a range of Trust personnel including (but not exclusively):
  - Full Trust Board and its sub-committees
  - CEO and COO
  - Leadership Teams across the Trust and Local Governing Committees
  - Business Managers and Finance Leads in the academies and college

### *Other Duties and Responsibilities*

- Play a full part in the life of The Bosco Catholic Education Trust community, to support its vision, values and ethos and to encourage staff and learners across the Trust to follow this example
- Develop Trust policies as required and contribute to the review of existing policies as appropriate
- Comply with Trust policies and procedures with regard to Health and Safety, Safeguarding, equal opportunities, race equality, conduct and dress
- For any approved service level agreements, deliver day-to-day duties consistently
- Interact professionally with colleagues to ensure understanding and awareness of responsibilities of all colleagues and undergo any relevant training
- Represent the CEO, COO or Board where required
- Undertake any other duties as may be reasonably required, commensurate with the job level

### *WORKING TIME*

- This is a part-time post, 15 hours per week, year round.
- Due to the nature of the role, the academy financial year (1<sup>st</sup> September to 31<sup>st</sup> August) must be adhered to.
- Core working hours are usually agreed between 8.00am and 5pm, however the post holder may be required to work outside of normal working hours on occasion, with due notice.

### *TERMS OF EMPLOYMENT*

All offers of employment are subject to the Trust receiving proof of identity, two satisfactory references, a pre-employment medical check, an enhanced DBS disclosure, a signed Code of Conduct, evidence of relevant qualifications and successful completion of a 6-month probation period.

## PERSON SPECIFICATION: CHIEF FINANCE OFFICER

The role of Chief Financial Officer calls for a finance professional with the necessary experience, skills and personal qualities to be able to operate as part of a hard-working and highly motivated Trust Central Team. There is an important role to play leading the Trust's finance functions and team in providing a robust financial infrastructure as well as an excellent opportunity to play an important and active part in the strategic direction of this forward looking, successful and thriving Trust.

This person specification will be used in shortlisting and interview to select the best candidate. Each applicant should therefore address the person specification in their written application and where appropriate should give examples of how they meet the criteria.

	Essential	Desirable	Method of Assessment
<b>Education and Qualifications</b>			
Educated to degree level or equivalent with a recognised accountancy qualification (e.g. ACCA, ACA)	✓		Application
Commitment to ongoing professional development, and staying abreast with developments in the field.	✓		Application
<b>Experience</b>			
Demonstrate a track record of successful financial leadership and building effective teams	✓		Application/Interview
Experience of financial reporting and management skills, and working with stakeholders to develop strong financial understanding and empathy across an organisation	✓		Application/Interview
Experience of working within the education/academy/charity sector		✓	Application/Interview
Experience of financial information and reporting systems, together with general computer literacy	✓		Application/Interview
Experience of developing and leading on new initiatives	✓		Application/Interview
Experience of financial reporting in the corporate and/or charity sectors	✓		Application/Interview
<b>Skills and Knowledge</b>			
Excellent leadership and management skills and ability to inspire, challenge and empower others and develop new working practices.	✓		Application/Interview
Entrepreneurialism and innovation, with an ability to identify commercial opportunities to maximise income	✓		Application/Interview
Strong organisational and time management skills.	✓		Application/Interview
Excellent analytical skills and sound judgment	✓		Application/Interview
Excellent IT skills and working knowledge of Microsoft Office	✓		Application/Interview

A good knowledge of the funding, regulatory and legislative environment of Academy Trusts, and in particular, the Academies Financial Handbook.		✓	Application/Interview
The ability to maintain quality and organisational procedures for the efficient running of the College finance office	✓		Application/Interview
<b>Attitude and Personal Qualities</b>			
High ethical standards and influencing skills with the ability to engage effectively with all staff across the Trust and with the Trust Board.	✓		Application/Interview
Accuracy and attention to detail.	✓		Application/Interview/ References
Ability to build relationships and influence within all levels of an organisation.	✓		Application/Interview/ References
Ability to work on own initiative and have confidence in to dealing with problems as they arise in a professional manner.	✓		Application/Interview/ References
Ability to multi-task, work under pressure and organise the work of self and others in order to meet deadlines.	✓		Application/Interview/ References
A proactive approach and ability to initiate change.	✓		Application/Interview/ References
Excellent interpersonal skills and ability to establish and maintain excellent working relationships with others.	✓		Interview/References
Excellent communication and presentational skills	✓		Application/Interview
An enthusiastic and flexible approach to working routines and practices.	✓		Application/Interview/ References
Understanding of the principles of confidentiality and the ability to handle sensitive data appropriately.	✓		Application/Interview/ References
Patience and ability to remain calm.	✓		Interview/References
Suitability to work with children.	✓		Enhanced DBS clearance/References
Commitment to uphold the Catholic Ethos of the Trust	✓		Application/Interview/ References
Commitment to equality of opportunity and anti-discriminatory practice.	✓		Application/Interview
Sensitivity to community issues.	✓		Application/Interview
Empathy with children and young people and the provision of a quality service for young people.	✓		Application/Interview

