



‘Innovative Education - Transforming Lives’

Recruitment Pack

Chief Finance Officer
Grade 12 £49,508 - £53,758
Full Time (100%)
Location: Edlington, Doncaster

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Letter from the Executive Principal/CEO

Beryce Nixon, National Leader of Education

Dear Applicant,

Thank you for taking an interest in developing your career with Exceed Learning Partnership. We are a relatively newly-formed Multi-Academy Trust but our leaders in all our academies have been making a significant impact in Doncaster schools for many years. It is a great opportunity to work with a group of fantastic school leaders who believe passionately in what they are doing. Our Chief Finance Officer will be part of a team supporting and enabling schools to improve the life chances of the children and families we serve.

When any of us choose to become teachers or leaders, I think we do so for three major reasons; we love our subject and want to inspire others to share this, we want to pass on our enthusiasm for learning to the next generation and we believe that a good education is the greatest means of helping establish a fairer society where everyone has the opportunity to make their most of their lives.

When we created Exceed Learning Partnership in April 2017, we did so in order to improve the life chances of pupils in and around Doncaster, particularly the most disadvantaged pupils. Having grown out of Edlington, the academies within the Trust have demonstrated that with the right provision, support and highest aspirations, all pupils can and will succeed. This is our ultimate goal within our Trust – making sure all our academies are exceptional places of learning where everyone thrives.

In our Trust we believe that teachers need the freedom to teach brilliantly, the development and training to grow as learners themselves and the leadership and support that comes from an organisation that is solely focused on education and is run by people who are passionate about teaching and learning and know how to create and sustain outstanding schools.

In our Trust we are delighted to welcome new and experienced teachers as well as great leaders who share in our vision to help our academies to thrive. We support our staff in their learning as well as contribute to their growth by sharing our experiences.

All of us within Exceed Learning Partnership continue to grow our expertise so that we can make a difference to the lives of our pupils.

On a personal level we are looking for an individual who shares our ambition to grow Exceed Learning Partnership into one of the most successful Trusts in the country. If you are confident that you have the skills, drive and vision to make that a reality, we hope you will apply.

We look forward to meeting with you and warmly welcome you to visit our Trust and academies.

B.A. Nixon

Beryce Nixon
Executive Principal/CEO
BA(Hons) QTS NPQH
National Leader of Education

Mission Statement

At Exceed Learning Partnership, we are committed to improving the life chances of all children. Where we have the capacity to make a difference, we are morally bound to do so.

We believe every child deserves the best possible start in life; a world class education aimed at helping the children in Exceed Learning Partnership academies to become successful learners, confident individuals and responsible citizens.

Our mission is to help every young person in our academies to expand their horizons, and build the confidence, talents, interests, skills and qualifications to succeed as they make their way towards a fulfilling and prosperous adulthood.

Members of the Trust strive together for excellence in partnership, so that our children, staff and communities benefit from excellent teaching, learning, leadership and opportunities.

Motto: 'Every Child, Every Chance, Every Day!'

The child will always be at the centre, with personalised learning as our starting point, making the challenges of 'Helping children achieve more' a reality. Each child will be encouraged to develop a greater understanding of themselves as a learner, what their strengths are, how they can share these with others and their next steps in their continual learning journey. Pupils will be encouraged and inspired to believe in themselves, build dreams and aspirations and strive to achieve these.

Every child will be given the same opportunity to succeed, whatever his or her prior attainment. A key feature of Exceed Learning Partnership will be a learning curriculum which builds the characteristics of learning across all the academies within the Trust. This will focus on our learning philosophy skills: Resilience, Motivation, Collaboration, Creativity, Investigation, Teamwork and Evaluation.

What are our Key Values for Learning?

Passion - Working in education, we have the ability to profoundly change children's lives; the stakes are incredibly high. Our aim should always be to provide for the pupils of our academies what we would want for our own children.

Urgency - The amount of time children spend in education is finite. We have a responsibility to ensure that every moment a child is in an Exceed Learning Partnership academy must be spent productively. Once wasted, it is gone forever and cannot be given back.

Positivity - Staff have a responsibility to be positive and supportive of each other. Negativity leads to low expectations and a culture where excuses are tolerated.

Aspiration - Embodied in the Trust motto, "Every Child, Every Chance, Every Day", all members of staff aim for excellence in their individual professional roles.

Commitment - Staff are prepared to go the extra mile to provide the best possible education for their pupils. The interests of children are always placed ahead of those of staff.

Principles Underlying our Academies

All share a relentless drive to support every child to make better than good progress in their learning to reach their full potential – **Raising Standards**

Have the highest expectations of all children and staff – **Raising Expectations**

Ensure all children become highly motivated and can challenge themselves to meet high expectations and aspirations – **Raising Aspirations**

Help children develop high self-esteem, respecting and taking responsibility for themselves, others and the environment – **Raising Confidence**

Recognise and reward success – **Rewarding Success**

Deliver consistently high-quality lessons which enable students to learn well – **Teaching and Learning**

Develop independent learning, communication, literacy and numeracy skills across all subject areas – **Core Skills**

Provide a creative and challenging curriculum which is personalised to meet the needs of all students – **Curriculum**

Create a variety of opportunities to promote students' spiritual, moral, social and cultural development – **SMSC**

Develop positive and secure 'Learning partnerships' between school, home and the community – **Community Cohesion**

Our Core Goals for our Academies

Our academies to excel in Statutory Test Outcomes for all their learners.

All academies enrolled within Exceed Learning Partnership to be capable of good or outstanding judgements from OFSTED when next inspected after two years of joining the Trust.

Our academies will develop innovative and transformational teachers who are constantly reflecting on the best ways to improve learning.

Our academies to be oversubscribed or on a significant upward admissions trend.

The academies to be working closely together within Exceed Learning Partnership, creating a sustainable model of high-quality education for the pupils who attend them. This will be as a result of accessing high-quality corporate services, sharing ideas that work, adoption of appropriate common policy and practice, co-development, support provision and utilising teachers, leaders and support staff for the benefit of all academies.

Exceed Learning Partnership to be self-sustaining and outward looking, using its capacity to support those who are underprivileged, in difficulty, or in any other way in need.

An inclusive culture to be the norm in each academy, with exclusions rare and every pupil leaving their academy with a plan for the next stage of their educational journey.

The Professional Development Programme to be producing high quality committed professionals and future leaders for ELP academies as well as schools beyond.

ELP academies to be recognised nationally as organisations of high quality, producing outstanding results within a culture of innovation and achievement.

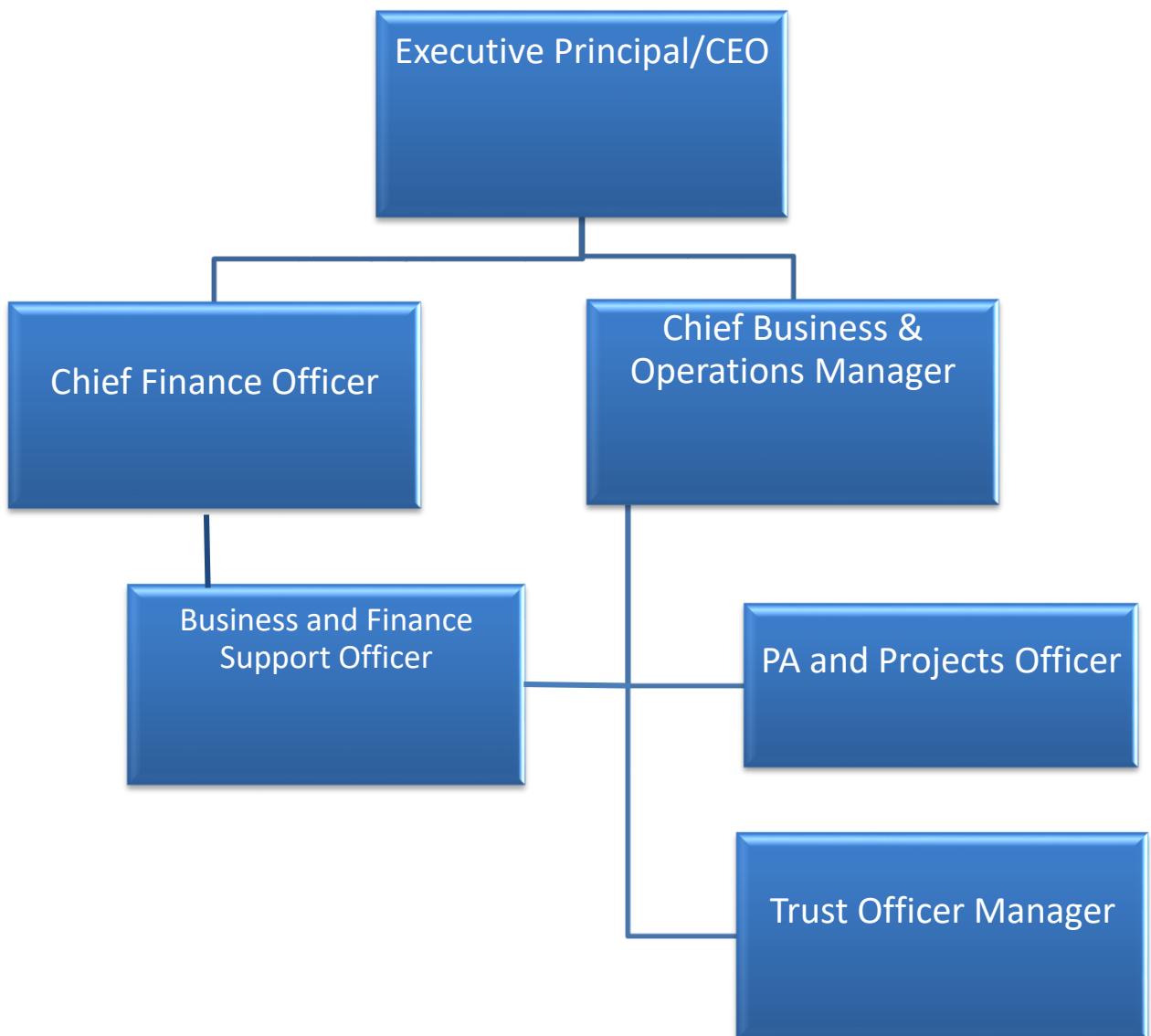
All academies within ELP to continually develop their own unique characteristics and ethos, re-enforcing their individual identities within their respective communities. In our academies, their unique distinctiveness will underpin how they grow, develop and enrich the experiences of all pupils across ELP.

Exceed Learning Partnership to constantly build upon the diversity of its academies in order to broaden the experience of its pupils and communities and challenge discrimination and prejudice in all its forms.

Meet the Members and Trustees

Names and Role	Skill Set
Fr Stephen Edmonds Chair of Members Director	Policy Officer for Northern Consortium advising on emerging government housing policy and best practice. Housing Investment Officer with Darlington Borough Council leading on housing investments and responsible for management of a £10m budget and is a member of a local governing body at a local secondary academy.
Martin Oldknow Member	Head of Technical Fire Safety department for South Yorkshire Fire & Rescue Service prior to retiring, over 15 years' experience in Fire Safety and Emergency Planning. Vice Chair of Doncaster Education Improvement Board and over 25 years' experience as a senior manager including budgeting and financial controls. National Leader of Governance with 25 years' experience of governance within schools and academies.
Andrew Tuke Member	Over 30 years' finance experience working in chartered accounts or as a Finance Director in businesses with turnovers of up to £25m. Excellent analytical and problem-solving skills and wide range of experience in other areas of management including HR, IT and general business management
John Blount Chair of Directors	Secondary science teacher, Assistant Head Teacher responsible for standards and achievement, data analysis, pupil tracking and timetable construction. Preparing bidding processes to secure funding in excess of £1m and secured a further £500,000. Vast experience in implementation of school policies and procedures and monitoring of budgets to support development of premises and internal infrastructure.
Melissa Flett Director	Over 20 years' experience in generalist HR, consolidated by a post-graduate diploma in personnel and development. Previously served as a HR Trustee/Director on charitable board 'People United Against Crime', vast knowledge of human resources and personnel encompassing payroll, pensions, employee benefits, contract and policy writing, wellbeing, conduct and capability, tribunal and litigation requirements.
Richard Brown Director	35 years in education leading to becoming Principal of a Community College, responsible for nearly 2000 children, 4000 community users, 300 staff, £8m revenue budget and capital projects in excess of £10m. Formed 'Leading Edge Associates' working with NCTL, Edge Hill University, local authorities, schools and academies developing the effectiveness and impact of governance on school improvement. Also served on three Interim Executive Boards in schools facing challenging circumstances.
Diane Dunn Director	Extensive experience of leading and driving school improvement, raising a school with serious weakness to a 'Good' Ofsted judgement early in her Deputy Headship progressing to Head and then Executive Head. A member of Partners in Learning Teaching School Alliance, sitting on the School to School support and Succession Planning strands. Supports newly-qualified teachers for the LA.
Carol Ann Swift Director	Experience of Headships in schools in challenging circumstances, served on the South Yorkshire Child Protection Committee and supported other schools and governing bodies as Associate Head Teacher. Senior Advisor in coordinating work for primary practitioners and leading development programme for newly-appointed Head Teachers. Supported schools and academies across four local authorities.
Jill Wood Director	Wealth of experience in facilities and estates management, responsible for development and implementation of business growth strategy. Worked as Facilities Manager for Doncaster Primary Care Trust ensuring efficient operation of premises throughout Doncaster and is currently Vice President at Doncaster Chamber of Commerce.
Joan Briggs Director	20 years' experience as Company Secretary for her family business, managing budgets and employees, ensuring compliance of policies in line with regulations including Health and Safety. Heavily involved with local community projects and served as Town Councillor. She is also a member of the Parish Council's Joint Consultancy Committee and Hope Quarries and Cemetery Committees.
Leanne Hornsby Director	Extensive experience of managing large transformation programmes in schools, local authority, health and wider partnership contexts and is passionate about improving outcomes for children, young people and their families. Currently Assistant Director for Commissioning and Business Development for Doncaster Council.

The Executive Team



About our Academies

Edlington Victoria Academy and Hill Top Academy are both large primary academies in the village of Edlington, Doncaster, for pupils of nursery age through to Year 6. Edlington Victoria has 281 pupils on roll, and was judged as 'good' during its last Ofsted inspection in July 2016. Hill Top was judged 'outstanding' in November 2011. It is a National Support School and the Executive Principal is a National Leader of Education. Hill Top currently has 398 pupils on roll. Carr Lodge Academy in Balby, a newly-built school in 2015, will offer 420 places to primary pupils and secured a 'good' judgement in January 2019. Exceed Learning Partnership has recently welcomed Sandringham Primary School to our Trust; a large primary in Intake with 455 pupils on roll. This academy has a 'good' inspection judgement, secured in June 2018. All our pupils come from a range of social and cultural backgrounds and the academies have a very strong community ethos which influences all aspects of academy life.

The academies have dedicated senior leaders who support the work of the Executive Principal/CEO in leading and managing improvement, under the guidance of a dedicated Board of Directors and Local Governing Boards. The academies also have a large number of support staff to enhance learning opportunities, including HLTA's and experienced Teaching Assistants. The academies are fully committed to the inclusion of all pupils and to providing the pupils with the most exciting and inspiring learning opportunities in order to raise standards and meet the core offer of extended services.





Job Description & Person Specification

Chief Finance Officer

JOB DESCRIPTION

Job Purpose Summary

This post offers an exciting opportunity for an ambitious and enthusiastic professional to join a relatively new and growing Multi Academy Trust. The Chief Financial Officer (CFO) will be directly responsible to the Executive Principal / CEO who is the Accounting Officer for Exceed Learning Partnership and is ultimately responsible for the proper financial conduct of the institution. The Chief Finance Officer is expected to bring a modern, business-like approach to the leadership of the finance function, including leading and managing all aspects of the finance, as well as contributing to the strategic direction of the Trust. All the work of the CFO will be rooted in ensuring benefit to the learners and families of the Trust services. The overall objective of Exceed Learning Partnership is to ensure that our Multi Academy Trust is one of the highest performers in the country in terms of the outcomes and experiences of its children.

As a key member of the Executive Team, the CFO will play an important part in setting the direction of strategic development. This will include regular reporting to the Trust Committees, including the production of high-quality reports to enable them to make informed decisions. The CFO will keep ahead of funding and legislative changes that apply to the education sector and will provide the Board of Trustees with strategic financial information to enable them to make informed financial decisions.

The CFO will be responsible for all aspects of financial management, including the management of financial records, budget control, financial planning (strategic and operational), funding relationships with the funding body and other agencies and related contractual arrangements with external organisations. They will ensure all systems are up-to-date and ensure the completion of statistical returns in line with required annual financial returns to the Education and Skills Funding Agency. They will work with the Business Managers to co-ordinate with the work of the external auditor to prepare and submit audited statutory consolidated accounts. Robust systems, processes and controls will be implemented and a fixed asset register maintained. The CFO will monitor all financial performance of the Trust and its Academies. The CFO will drive change within the finance operation of the Trust, bringing greater efficiency in the way the Trust carries out its business.

In the current financial climate, supporting academies to maximise income generation will be an important part of the role. The CFO will regularly visit the academies within the Trust to develop good working knowledge of the academies, and work with the Trust's Business and Operations Manager to ensure good use of resources by utilising and developing capacity from within the Trust and contracting from outside the Trust where this is not available.

In all their work the Chief Finance Officer will recognise that their prime responsibility is to the children, ensuring they have the best opportunity to achieve their best outcomes.

KEY RESPONSIBILITIES

A non-exhaustive list of specific responsibilities for the role is below; you will be required to undertake other duties and responsibilities as may reasonably be required.

Strategic Leadership

- Provide sound financial advice to the Executive Principal/CEO and Trust Board on all financial matters in order to improve performance and maximise opportunities
- Monitor and manage the funding allocation to the Trust, making recommendations on investment of surplus balances
- Keep the Executive Principal/CEO, the Trust Board and other key personnel up to date with the latest developments and changes in finance matters
- Own the budgeting process for the MAT, setting key assumptions for academies, overseeing the budgeting process within member schools and ensuring the consolidated budget is in line with expectations of Trustees
- Develop and own a rolling four-year financial projection for the Trust, including projections for academies, assumptions around joining schools, and central MAT forecasts
- Support in ensuring the financial sustainability of the Trust
- Advise the Executive Principal/CEO and the Trust Board on all matters relating to financial strategy and the impact of decisions on the financial position of the Trust
- Provide advice, support and training (if required) to MAT school staff on financial and budgetary matters, ensuring they meet legal requirements and follow best practice
- Identify fundraising, income generation and grant application opportunities
- Review Trust policies, processes and procedures to ensure compliance with various external regulations, including filing deadlines regarding VAT, PAYE, ESFA, DfE, HMRC, Charity Commission and Companies Acts
- Provide induction training on finance matters for Directors, Governors, Principals and key personnel
- Assist the Business and Operations Manager and schools through the conversion process, working with stakeholders to ensure a smooth transition.

Statutory Obligations and Reporting

- Ensure the ELP MAT is compliant with legal requirements in respect of all accounting processes and practices, public sector finances, HMRC regulations and the Academies Finance Handbook
- Have overall responsibility for the production of the annual accounts for audit
- Ensure all statutory and non-statutory returns for internal and external use are completed in an accurate and timely manner
- Support in the preparation of consolidated financial statements in the format specified by the ESFA and in accordance with the audit timetable

Financial Control

- Maintain a secure overview of the management of all financial issues within each of the Trust's schools
- Ensure the production of monthly management accounts, including variance analysis and balance sheets, and ensuring that cash flow projections take place within academies and the Trust, promptly highlighting anomalies and trends
- Ensure that reports and accounts for the Trust as a whole are produced termly or as required
- Ensure that in-year budget surpluses/deficits are managed appropriately
- Co-ordinate the annual budget-setting process to include assisting the Principals and Business Managers with setting budgets at local level
- Attend and prepare reports for sub-committee meetings and the main Board meetings as required
- Co-ordinate and manage the internal and external audit processes and liaise with external regulators as required
- Implement operational best practice
- Successfully manage the academy finance leads and the service level agreements with any financial services contractors
- Assist in maintaining the Trusts risk register
- Manage the Trust's central procurement processes and funds

Payroll and Personnel

- Develop and evaluate the payroll service
- Ensure the monthly payroll is checked, and certified by the academies' Principals and Executive Principal/CEO
- Compare actual payroll costs each month to budgeted costs and ensure that such reports are passed to the Executive Principal/CEO and retained for future audit purposes

PERSON SPECIFICATION

	Essential	Desirable	How Identified
Professional Qualifications			
Honours Degree in a Business/Finance related discipline (2:2 classification minimum) or relevant equivalent experience	✓		App Form/ Certificates
CCAB qualification (CIPFA qualification desirable due to its sector-specific nature)	✓		
NCSL Certificate in Financial Reporting for Academies		✓	
CIPFA Certificate in Financial Reporting for Academies		✓	
Willingness to undergo further training as deemed appropriate and especially on the introduction of new office systems	✓		
Ability to recognise/evaluate own training needs and actively seek learning opportunities	✓		
Evidence of continued professional development	✓		
Well-developed ICT Skills	✓		
Experience, Skills, Abilities and Competencies			
Extensive knowledge of funding streams for academies		✓	App form/ Interview/ References
Detailed understanding of accounting standards applicable to Trusts	✓		
Knowledge of the budget-setting process and medium term financial planning	✓		
The ability to communicate effectively with external auditors in relation to statutory year-end accounts	✓		
The ability to develop and implement new systems and processes in a timely manner	✓		
The ability to work without supervision	✓		
Excellent knowledge of financial systems and accounting structures	✓		
Knowledge and understanding of the academy conversion process		✓	
Extensive experience of constructing and presenting statutory accounts	✓		
Experience of producing monthly management accounts	✓		
Experience of formulating short/medium term financial plans	✓		
Experience of developing financial systems and reporting structures	✓		
Experience in liaising with internal and external auditors and implementing audit recommendations	✓		
Extensive and strong background in public sector finance		✓	
Excellent analytical skills and sound judgement	✓		
Excellent communication and presentational skills	✓		
Extensive experience of financial information systems and computer literacy	✓		
Personal Qualities			
Good understanding of Financial Management processes	✓		App form/ Interview/ References
Ability to organise, plan and manage finances in a timely manner	✓		
Ability to organise, plan and manage the finances to achieve objectives and targets within approved financial constraints	✓		
Ability to design, develop and implement effective financial management information systems, office practices, protocols and procedures	✓		
Understanding of the role, responsibilities, delegations and reporting requirements of the Local Governing Body, Service Committees/Support Groups and Board of Directors as an academy within a Multi Academy Trust	✓		
Understanding of the effective use of a broad range of ICT to provide management, finance and administration solutions within the academy	✓		
Excellent understanding of the procurement process	✓		

Good literacy, numeracy, communication, inter-personal and negotiating skills	✓		App form/ Interview/ References
Proactive and positive approach to problem-solving	✓		
Reliable and trustworthy	✓		
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	✓		
Communications			
Communicate effectively and respectfully with all stakeholders as appropriate and as required	✓		App form/ Interview/ References
Communicate with external agencies, as required	✓		
Adhere to agreed policies for communications within the Trust	✓		
Contact with students and their parents/carers, other employees at the Trust/Academies, must be in accordance with policies and procedures. Liaise with professionals under the supervision/guidance of the Executive Principal / Principal and/or Strategic Leaders, as appropriate	✓		
Take part in marketing, liaison and networking activities as required, for example open evenings, events, etc	✓		
General Duties			
The post-holder is required to carry out the duties in accordance with the Trust's Equal Opportunities Policy	✓		Interview
The post-holder will ensure that the duties of the post are undertaken with due regard to the Trust's Health and Safety Policy and to their personal responsibilities under the provisions of the Health and Safety at Work Act 1974 and all other relevant subordinate legislation	✓		
Have a responsibility to safeguard and promote the welfare of pupils within the academy	✓		
Additional			
Travel in connection with the post	✓		Interview
Satisfactory enhanced DBS check	✓		DBS process
Satisfactory Trust pre-employment checks	✓		Trust process

Because of the nature of the post, candidates are not entitled to withhold information regarding convictions by virtue of the Rehabilitation of Offenders Act 1974 (Exemptions) Order 1975 as amended. Candidates are required to give details of any convictions on their application form and are expected to disclose such information at the appointed interview. Furthermore, applicants are required to inform the Trust of any such convictions throughout their period of employment.

Applicants should note that the Trust is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment. All successful applicants will be required to undertake an Enhanced Disclosure and Barring Service (DBS) check.

Employees will be expected to comply with any reasonable request from those in a position of responsibility, to undertake work of a similar level that is not specified in this job description.

This job description is current at the date shown. In consultation with the post-holder, the job description may be changed by the Executive Principal to reflect and/or anticipate changes in the job that are commensurate with the role.

Candidates from all sectors will be considered as long as they can demonstrate transferable skills and a commitment to continuous improvement and excellence in a changing landscape, where ensuring the sustainability of the organisation is key.

What we can offer you

We recognise that successful people place value on a range of benefits associated with their careers including receiving professional recognition, commensurate financial reward, job satisfaction, opportunity to innovate and a balanced approach to work and personal time. As your future employer we place importance on these aspects too.

- Salary Grade 12 £49,508 – 53,758
- Competitive pension scheme – Local Government Pension Scheme
- 28 days' annual leave plus bank holidays
- Access to continuous professional development opportunities
- Access to support from the Trust's Health package
- Support from the ELP Trust Team and their knowledge of the landscape and individual academies
- Strong existing partnerships and networks

The recruitment process

Closing Date: 2nd July 2019 (Midnight)

Shortlisting: 4th July 2019

Interview Date: 10th July 2019