



The Little Way Catholic Educational Trust

Chief Financial Officer

Welcome to our Trust - The Little Way Catholic Educational Trust.

Governors and Leaders of six primary schools based in Gloucestershire are working together to open the third Trust within the Catholic Diocese of Clifton. The opening date is 1st January 2024. Becoming the Trust's Chief Financial Officer (CFO) post-holder offers an exciting opportunity to be part of a trail blazing enterprise.

Our CFO will need to be an experienced and visionary leader, committed to working closely with the Trust Board, all the schools in the Little Way Partnership and all other key stakeholders and delivery partners to create collaborative environment in which the best interests of all children within and beyond the Trust. Postholders will need to be committed to upholding the Catholic values upon which the Trust is founded and this includes facilitating the delivery of the Bishop's longer term vision and growth plan by building strong professional and collaborative relationships and support with other Diocesan schools, partnerships and Trusts.

Our Schools

At present our Trust will be comprised of six primary schools from the Gloucestershire area, however we have plans to expand the trust to include secondary schools and further primary schools from the Swindon area. Our current schools are listed below, and more details can be found about each of their websites.

The Catholic School of Saint Gregory the Great is a two-form entry school located in the centre of Cheltenham, a regency town that has much diversity – this is reflected in the characteristics of the children who attend the school. 'St Gregs' is an Ofsted Outstanding school.

St Joseph's Catholic Primary School is currently a one form entry school located in the Cotswold village of Nympsfield. The school was judged Good in their last Ofsted and Outstanding in their last Section 48 Inspection.

The Rosary Catholic Primary School is a one form entry Primary School serving two parishes. It was founded in 1875 and the current building was opened in 1967. There are extensive school grounds.

St Thomas More Catholic Primary School is a single form entry, which meets the needs of local area, and most pupils live less than a mile from the school. The school serves mainly the Hester's Way area in Cheltenham, which is identified as being in the top 10% of most deprived wards in England in 2019

St. Peter's Catholic Primary School is a two-form entry school located in the centre of Gloucester. The school serves the 3 catholic parishes of Gloucester, the 2 catholic parishes of the Forest of Dean and Newent catholic parish. Our school family is enriched with a diverse range of ethnicities and 54% of our school population speak English as an additional language. Our SEND and Pupil Premium percentages are broadly in line with national.

St Catharine's Catholic Primary School is a small school located on the High Street in Chipping Campden, a town in the North Cotswolds. It sits on the border of Gloucestershire, Warwickshire and Worcestershire and is over 150 years old. There are currently 5 classes.

Our Priorities

As a newly formed trust, the priorities that we expect our CFO to lead on, and / or contribute to are as follows:

- 1 Forming the six individual schools of the Trust into a cohesive whole, rationalising processes and implementing good practice across the whole where appropriate, whilst maintaining the characteristics of each school.
- 2 Ensuring the financial viability of the MAT over the next 5 years with an eye on the next 10; including the development of robust financial plans alongside cost savings and income generating initiatives.
- 3 Supporting all schools to deliver the highest quality of education appropriate to their individual situation with a particular focus upon student progress.
- 4 Establish robust business practices across the Trust to include all business support.
- 5 Growing the Trust to include at least one secondary school and further Primary Schools.

Our CFO

The CFO is a critical leadership role in the Little Way Catholic Educational Trust (LWCET) reporting to the CEO and working closely with the Trust Board. The CFO of The Little Way Catholic Educational Trust (LWCET) has delegated leadership responsibility for the finance and business operations (inc. Statutory Reporting and KPIs) for the Trust as a whole and ensuring public funds are well spent in delivering the Trust's vision, ethos, statutory requirements, and strategy in the best interests of all pupils at multiple school sites.

The person appointed should hold an appropriate accountancy qualification.

The CFO is the Trust's principal financial adviser and will work openly with the CEO and Trust Board to contribute to the development and delivery of highly effective and efficient governance, financial strategy, and policy, and internal controls/KPIs and assurance processes which ensure compliance with the Trust's statutory requirements as a charitable company funded and regulated by the Department for Education.

The CFO has a major role in supporting the setup of the Trust in the short-term and in the medium to longer term, delivery of the Bishop's growth plan. This aims for three Trusts (northern, central, and southern) to be open by 2025. LWCET would form the Northern MAT expected to grow from six Catholic primary schools in 2024 to thirteen Catholic primary and two Catholic secondary schools serving a combined total of circa 6k pupils over the next five years. Two other trusts Dunstan and Newman have already been established. As an increasingly complex organisation this will require the post-holder to promote effective advocacy, stakeholder engagement and the completion of due diligence for prospective new or joining schools to enable informed decision making by the Trust Board.

Although initially a part time role, we envisage the role becoming full time in the near future and applicants are encouraged to see the huge potential for growth in role. For the right candidate, pay and reward will be discussed as the Trust, and therefore the responsibility of the post holder, grows. We support remote working, can be based. However, we will expect some time per week working from our school sites to ensure that the post holder develops a connection to the Trust and remains cognisant of our primary role of providing opportunities for the children within our care.

We want the broadest range of people to apply for this role. Cultural fit, unconventional thinking and commitment

to our vision and values as a Catholic Trust are the attributes that we are looking for. You do not have to have worked in education to apply for this role, in fact we would encourage people from other areas of expertise to apply. Perhaps you are looking for a career change, are returning to work after maternity or a career break or are transitioning from the Armed Forces; we want to hear from you if you feel that you can fulfil the key responsibilities below.

Main Duties and Responsibilities the CFO will be accountable for:

- Uphold the Trust's Catholic ethos.
- Act as the principal financial adviser to the Trust Board to ensure financial viability and sustainability, reporting on KPIs and facilitating informed decision making.
- Drive excellence in all areas of the Trust's finance and business operations. Developing strategic financial and business plans and developing the Trust's financial and business capabilities. Ensuring all accounts and audits are completed as required and compliance with the Trust's statutory and contractual requirements as a charitable company regulated and funded by the Department for Education.
- Lead on initiatives to support the growth of the Trust, cost saving measures and income generation and due diligence of new schools.
- Ensure the highest standards of probity, propriety, and value for money in managing public funds from all stakeholders and contract providers.
- Oversee all the Trust's finance and business operations including the Central Service Team and all non-teaching support functions e.g. HR, estates, procurement, marketing, H&S, capital, tax & VAT, charities commission returns.
- Oversight of School Business Managers and point of contact for any issues.
- Liaise with ESFA and other external bodies on key business and financial matters.

All employees have a duty to safeguard and promote the welfare of children, young people, and vulnerable adults. It is an essential requirement that employees are aware of the Trust's Safeguarding procedures for sharing information about the welfare of any person for whom they have safeguarding concerns. Employees have a duty to ensure they attend training to enable them to recognise the indicators for concerning behaviour and receive safeguarding supervision as appropriate.

Our offer

Aside from a competitive salary, alongside salary reviews to coincide with growth of the Trust, we offer an Employee Assistance Programme, cycle to work scheme and half price childcare. The development of reward and remuneration packages will be a key component of the CFO role, so this is an area that, over time, the successful candidate will have the opportunity to shape. In addition to bank holidays, we offer 25 days of holiday per year.

Key info and application process

Post:	Chief Financial Officer
Contract:	Permanent, 0.4, all year round
Salary:	£55K-£65K per annum (pro rata)
Base:	Flexible / remote working as per Trust policy is available. Time to be spent within each Trust school.
Closing date:	Midday on 2nd October 2023
Interview date:	Week Beginning 9 th October 2023
Application form:	Catholic Education Service Application
Accountable to:	Chief Executive Officer
Reports to:	Chief Executive Officer, LWCET Trust Board and relevant trust committee(s)
Line Manages:	None at commencement but with some responsibility for School Business Managers and support personnel. Over time will manage the Central Service Team

If you are interested in applying for the position of CFO and would like to have an informal conversation before completing an application, please contact Andrew Pyne, Chair of the Trust Board, apyne@st-gregorygreat.gloucs.sch.uk to arrange a mutually convenient time to talk.

To apply, **all** applicants are asked to fully complete the CES application and include a covering letter detailing the challenges that you anticipate in years one and two of the Trust and how as CFO, you would overcome them. Please submit them both to apyne@st-gregorygreat.gloucs.sch.uk by the closing date/time stated above.

The Trust is committed to equality, diversity and inclusion and safeguarding to promote the welfare of children and young people. The successful applicant will be appointed subject to the MAT opening and satisfactory completion of all recruitment processes. This includes obtaining an enhanced Disclosure and Barring Service (DBS) Certificate and Section 128 clearance.

The Diocesan privacy notice can be found via its website: [Privacy Notice | Clifton Diocese](#)

Appendix 1:

Job specification and Person specification attached.

Appendix 2:

CES Job application form

<https://www.catholiceducation.org.uk/recruitment-process/item/1000042-model-application-forms>

Please use the model application form for Support staff.

Appendix 1

Job Specification & Person Specification

Overall, Purpose of the Job

As a member of the Trust's Senior Leadership Team, the Chief Financial Officer (CFO) will have strategic responsibility for all aspects of Trust finance, asset management, risk management and capital planning and procurement. The CFO will play an integral role in supporting and improving the schools joining the Trust and support them to become more financially sustainable.

Key activities

- To provide strategic guidance, leadership, and management of all Trust's finances within the scheme of delegation, advising the CFO, Directors, and school leaders of all financial matters related to the Trust.
- To ensure effective stakeholder management, compliance, and support to various stakeholders – DFE, ESFA, Diocese, Trust Board, Directors, school communities.
- To develop and manage the Trust's financial services, including implementation and management of the Trust's accounting system and internal controls.
- To be responsible for all statutory accounts, financial returns, and reports to Directors, ESFA/DFE and statutory bodies.
- To be responsible for the financial Trust plan, ensuring that individual academies are monitoring against their short- and medium-term development plans.
- To lead the promotion and delivery of sound financial management throughout the Trust and ensuring compliance with Academy Trust Handbook.
- To develop and manage the system of internal financial reporting and monitoring.
- To develop financial support services for schools joining the Trust to develop school improvement.
- To ensure that the Trust complies with its obligations in accordance with its funding agreement, the Academy Trust Handbook and the Trust's financial policies and procedures.
- To co-operate with, initiate, and manage audit procedures.

Finance, Audit and Risk

- To advise and support the CEO in the financial aspects of their role as Accounting Officer.
- Ensure that the Trust follows best practice in terms of financial governance and ensure the probity and legislative compliance, of all financial transactions, including the integrity and suitability of all control mechanisms (audit and risk management).
- Working closely with the CEO and school leaders deliver annual and medium-term budget plans, periodic forecasts which are aligned to with school and Trust improvement priorities.
- Contribute to all areas of Trust strategy and provide financial analysis and guidance on plans and targets.
- Lead on the Trust's approach to audit and risk management.
- Develop systems for the identification, measurement, and management of risk, including the Trust risk register.
- Manage the Trust's internal and external audit process and ensure they are fit for purpose in line with statutory guidelines.
- Lead on implementing audit improvement points.
- Manage the development of financial reporting systems including relevant KPIs.
- To manage the income and expenditure budgets across the Trust in line with the scheme of delegation, and so identify and potential financial risk and implement strategies to address issues arising.
- To proactively manage the cash position of the Trust and its schools and report on this to the Directors.
- To plan and co-ordinate all tax and treasury management.

Strategic Leadership

- To provide strategic advice to the CEO and Directors on financial issues.
- Actively contribute to the Trust's long-term corporate plans including preparing financial forecasts.
- Develop and implement strategies for maximising the Trust's finances.
- Participate in the management of major Trust projects.
- Participate in the delivery of the Trust Growth strategy.
- Promote financial awareness throughout the Trust.

Pensions and Payroll

- Ensure that the Trust services for payroll and pensions across the Trust are efficient, value for money and compliant with all relevant regulation.

Procurement

- Lead the procurement strategy and ensure policies and procedures for buying and ordering supplies and services are compliant, efficient, and generating economies of scale.
- Oversee the management of contracts and Service Level Agreements to achieve maximum value for money as the Trust grows.
- Lead on insurance arrangements for the Trust.

Capital Planning and Asset Management

- Identify capital grant opportunities and oversee the preparation of capital grant bids.
- In collaboration with the CEO, School Leaderships and external agencies prepare a rolling programme of capital purchase plans.
- Develop and implement policies and procedures for the procurement, recording, depreciation, and disposal of capital assets.

Data Protection

- Lead on the development and management of Trust data protection policies and procedures including privacy notices, retention and destruction policies and systems for recording and responding to Freedom of Information and Subject Access requests.

General Responsibilities

- Contribute to and uphold the Catholic vision and ethos of the Trust.
- Promote teamwork within the central Trust and member schools.
- Comply with equal opportunities and all Trust Policies
- To assist with the development of policies and procedures as may be required outside own role.
- Maintain a presence at local and National professional networks.
- To participate in Professional development and performance management as required.
- To ensure the finance teams are appropriately trained.
- To always maintain confidentiality.
- Other duties commensurate with the senior nature of the post as directed by the CEO.

All employees have a duty to safeguard and promote the welfare of children, young people. And vulnerable adults. It is an essential requirement that employees are aware of the Trust's safeguarding procedures for sharing information about the welfare of any person for whom they have a safeguarding concern. All employees have a duty to ensure they attend training.

PERSON SPECIFICATION

Key Essential Criteria -E Desirable -D

Qualifications

Professional Accountancy Qualification- ACA, CIMA, ACCA or CIPFA	E
Educated to degree or equivalent	D

Experience

Senior financial management and strategic leadership either in the public or Private sector	E
Proven track record of successful financial leadership and building effective teams	E
Significant experience of leading and managing budgets, and working with stakeholders to develop strong financial understanding	E
Experience of developing and managing external relationships with professional and regulatory bodies.	E
Experience of working within an educational setting	D
Experience of rapid high change environments and settings	D
Experience of working with Governors, Directors or similar	D
Experience of Bid writing	D
Experience of managing multi-site and multi -disciplinary teams	D
Change management experience	D
Experience of establishing financial systems and processes	D
Experience of working with external and internal audit teams	D
Experience in managing procurement and contracts	D
Experience in the evaluation, documentation, and management of risk (financial and non-financial)	D
Experience of buildings management	D

Knowledge

Detailed and up to date knowledge of charity, accounting, and professional codes of practice	E
Knowledge of Academy financial reporting, including statutory accounting, the Academy Trust Handbook and other ESFA returns	D
Awareness of and respect for highly sensitive status of information and its confidentiality	E
Up to date knowledge of Data Protection,	D
An understanding of school funding streams	D

Skills

The ability to present complex information with knowledge and confidence to meet the needs of a wide stakeholder groups from diverse backgrounds	E
A tolerance for ambiguity given the evolving nature of the Trust	E
Excellent analytical skills	E
Excellent communication skills oral and written.	E