



Welcome to work at UST

Job application pack

Chief Financial Officer



University
Schools Trust
A transformational education



Welcome to UST

I am proud to introduce you to UST, a group of incredible schools providing an excellent education that is derived from exceptional teaching and learning.

We were founded on the premise of transformation through partnership

We began as a unique partnership of six world-leading universities and other sector-leading bodies, supporting our shared vision of inclusive, high quality and transformational education delivered by schools which are deeply rooted in the communities they serve.

Collaboration has always been at the heart of providing transformational experiences. Whether it's our incredible partners, school to school partnership groups, staff CPD opportunities or working alongside our dedicated parents, we learn from one another to improve the life chances of every child in our care.



We believe in innovation and improvement

The UST School of Education, our innovative centre of excellence supports the development of our curriculum, teaching and learning principles and wider school improvement. Our university links enable us to co-commission and participate in research to stretch our knowledge of what works and why, and our culture of open collaborative partnership encourages staff to share and learn with other education professionals.

Pride in our staff

We pride ourselves on being inclusive, welcoming anyone who wishes to join UST. Support or teaching staff, whether you are new to the profession or looking to further an existing career, we want to work with you if you are determined, passionate and committed to supporting every child at UST.

Ethical employment

UST is committed to ensuring our recruitment practices are ethical, fair and non-discriminatory and are enacted to ensure our approach is consistent with the principles of anti-discrimination and equal opportunities legislation.

I look forward to welcoming you to UST. It truly is an environment in which you can flourish, where hard work is rewarded.

Kind regards,

Gillian Kemp
Trust Leader



What makes UST unique?

Our vision and values

Our overriding purpose as a Multi-Academy Trust is driven by our vision and values.

Vision: Where collaboration breeds transformation

Guided by and working with our Trust Partners:

The Trust is a family of inclusive schools where collaborative partnerships deliver a transformational education which empowers our pupils and the communities they come from to realise their full potential. A culture of high expectations nurtures a drive to achieve excellence and to take ownership of future academic and vocational learning paths in order to equip our pupils as global citizens and inspire their communities.

Values: The UST Guarantee

Achieving Excellence through Transformational Education that Empowers Communities.

Achieving Excellence: The Trust inspires each member of our learning community to be ambitious, to realise their potential and to succeed academically and vocationally.

Transformational Education: The Trust ensures that the dynamic curricula and pastoral offers of our schools are enriched by the civic leadership and research from our university, public and private Trust partners.

Empowering Communities: The Trust strives to equip all pupils and staff with the skills to transform their lives, empower communities, and excel in our global society.



A partnership to be proud of

A partnership of pioneers

Our Trustees are appointed from the world-leading and internationally renowned universities that helped found UST, and from organisations across a spectrum of other sectors. They are united by an innovative shared vision that seeks to provide staff, pupils and families with an extensive and comprehensive range of experiences and opportunities.

A partnership that challenges the status quo

Our commitment to empowering communities, improving social justice and breaking barriers that inhibit social mobility is enshrined in our daily practice. We focus on reducing the attainment gap for those who are amongst the most disadvantaged in our society.

A partnership of equals

In many trusts you will find a 'lead school'. Not at UST. We want idea sharing to flow between all of our schools. We know that every school excels in different areas, and we facilitate school improvement by best practice being shared, implemented, observed and perfected amongst us all.

A partnership which nurtures

We place people at the heart of our strategic approach because we believe this is fundamental to running successful schools. We invest in our staff with support, mentoring and a wide range of top quality training programmes.

Our schools



Cyril Jackson is an Outstanding rated primary school, offering a curriculum which engages and inspires, a diverse range of educational visits and experiences, outstanding pastoral care and high expectations, all within a happy, safe and supportive environment.



Through a broad and balanced curriculum, a wide range of enriching learning experiences and a tailored approach to supporting the individual student, our students will leave school as young adults who are responsible global citizens who have a clear vision for their futures.



St Paul's Way Trust is an all-through school, including nursery to sixth form, known for being the university school in the heart of east London. The hallmark of SPW graduates is to be fully prepared for the opportunities and the demands of the adult world.



Benefits at UST

We want our employees to enjoy a rounded package that supports their wellbeing, boosts their career progression and gives them financial security. We are committed to being the local employer of choice and we firmly believe that is the case. As such, we have pledged to evolve the UST benefits package at regular intervals.



KATY, FUNDRAISING AND PARTNERSHIPS COORDINATOR

"One of the things that I love is our collaborative ethos. I have seen some trusts have an 'us and them' culture between the schools and central services, but that couldn't be further from the truth at UST."



DARREN, DIRECTOR OF DATA AND COMPLIANCE

"Being on the executive team I get to see the impact that people have across UST. It never ceases to amaze me how many incredible people that I get to call colleagues."



JOYCE, DATA CONTROLLER

"UST is just a fantastic place to work. The leadership team are incredibly welcoming and approachable. They will always take the time to help you if you need it."



UST School of Education



Matthew Glenn: Director of Education (Secondary)

As Director of Education for UST, I ensure the educational success of the schools within the overall framework of the UST strategic plan, as well as the individual school.

I am the lead for what is known as the UST School of Education. Within this role, I oversee the professional development of all staff at UST. I believe this journey of improvement is continuous, which is why we place significant time and resources into meeting the requirements of all staff at every career stage.

UST recognises that continuous professional development adds exponential value to the environment, learning experience and support our pupils receive. This is why we are committed to supporting each member of staff and their personal career ambitions.

By providing the highest quality education and learning environments, our staff:

- Are enabled to develop their practice and excel as professionals
- Become integral to succession planning within the school and Trust
- Make a real difference to our pupils and in the wider community we serve.



STAFF PROFILE: OLIVIA SAUNDERS

**RGTS Deputy Headteacher
Inclusion & Character Development**

“UST was in its infancy when I joined six years ago. It has grown into an organisation which emphasises the importance of connecting education from primary through to university. I have not encountered a trust that approaches education this way.

Such innovative thinking is at the heart of what UST does. I work closely with the Director of Education and other expert UST consultants who supports our reviews, from which I have found myself challenged and supported to make sure we are delivering best practice.

This desire for improvement is driven by UST’s culture, and is facilitated by the collaboration between our schools. We are always working on building links at senior and middle leadership, where we can share resources, learn from one another and support our peers.

Schools can often be echo chambers. Not at UST. When you’re a part of our Trust you never feel isolated and without someone to turn to for a different perspective.”



Job Description

| | | | |
|------------------------|-------------------------------------|---------------------------------|--------------------------------------------------|
| Job title: | Chief Finance Officer | Contract Type: | Full Time, Permanent |
| Responsible To: | Trust Leader | Grade & Spine Point: | L20 – L37 per annum (dependent on experience) |
| Location: | UST Office / Schools / Home Working | | |

Job description:

APPOINTMENT OF CHIEF FINANCE OFFICER

We are seeking to appoint a Chief Finance Officer (CFO) to:

- Provide financial and strategic leadership to the Trust and its schools
- Support the Trust Leader in the successful delivery of our strategic plan
- Fulfil the role and responsibilities of the CFO of an Academy Trust.

The CFO will be a member of the Trust's Executive Team.

JOB PURPOSE

The overall purpose of the CFO role is to lead, develop and coordinate the Trust's financial strategy in order to support outcomes for its pupils by providing high-quality support and advice to the Trust Leader and other senior leaders, headteachers, trustees and members of our school committees. The post holder will support the Trust's growth by developing and building its financial capacity and resilience.

The CFO is expected to bring a modern, commercial approach to the leadership of the Trust's finance functions, coordinating activities within the schools in order to deliver a highly effective and value driven service with an emphasis on developing productive partnerships and realising the benefits and efficiencies of shared service provision and economies of scale across the Trust.

The CFO will report to the Trust Leader and support them to fulfil their statutory duties and responsibilities as the Trust's Accounting Officer.

SPECIFIC KEY ACCOUNTABILITIES

- Provide strategic oversight of the finance function across the Trust, delivering high quality, effective and proactive service provision.
- Ensure financial standards are compliant with current legislation and the requirements of the Trust's Funding Agreement, the ESFA, the Academy Trust Handbook, the Charity Commission, HMRC and other statutory and non-statutory organisations as required.
- Ensure the effective recording, management and reporting of the Trust's finances, including budget planning and monitoring.
- Communicate financial information to senior leaders and trustees effectively and in ways that support and inform financial decision-making.
- Develop and ensure compliance with procurement processes across the Trust in accordance with statutory requirements.
- Maintain a comprehensive record of contracts and services across the Trust ensuring contracts deliver high quality services and best value.
- Implement an appropriate organisational structure for the financial functions of the schools to include monitoring and reporting of results and key performance measures to the Trust Board.
- Lead, motivate and enthuse a team of staff within the central team and across the schools in promoting high professional standards and achieving the Trust's strategic goals.

SPECIFIC DUTIES AND RESPONSIBILITIES

- In conjunction with the Trust Leader and the Executive Team, develop the strategic plan for the Trust ensuring it contains appropriate key financial performance indicators.
- Monitor and report on these plans at agreed intervals.
- Lead the preparation of Trust's and individual schools' annual and three-year budgets as well as in-year forecasts and other financial planning tools as required to support the Trust in achieving its financial objectives and enhancing the Trust's financial resilience.
- Complete on a timely basis monthly management accounts, reporting and presenting them to the Trust Leader, headteachers and Trustees as appropriate.
- Ensure the efficient operation of all day-to-day financial transactions required by the schools using the Trust's financial software.
- Lead and manage the Trust's monthly payroll with the external bureau and ensure that all relevant requirements relating to PAYE, etc. are complied with.
- Oversee the Trust's banking arrangements, including maintaining an appropriate framework of internal authorisations and provide information to Trustees in line with the requirements of the Academy Trust Handbook.

Financial Reporting

- To work with budget holders to establish, agree and monitor budgets, producing monthly reports for headteachers and senior leaders.
- To manage inter-company accounts between all entities within the trust, reconciling monthly to recharge between schools.
- Oversee payroll and pension processing ensuring it is managed efficiently and correctly.
- Plan and manage cash flow and funding, in consultation with the Trust Leader, ensuring compliance with relevant external funding bodies.
- Be responsible for monthly closing coordination and ensuring the correctness of accruals/provisions.
- With the Board and Trust Leader, develop a plan for the appropriate management of accumulated cash reserves, considering investment activities and additional fundraising initiatives.
- Take a leading role in identifying the Trust's exposure to financial risks, developing strategies and controls for mitigating risk and minimising any remaining exposure.
- Ensure that the Trust has appropriate insurance cover in relation to identified risks.
- Be the lead officer for the Resources Committee.
- Attend School Committees and other meetings as appropriate.
- Plan and manage the Trust's VAT and taxation liabilities in the light of existing and/or proposed legislation in order to minimise amounts due whilst meeting legal requirements.
- Ensure that all fixed assets and depreciation charges are treated in line with current policy.
- Implement a robust financial control environment across the Trust to ensure full compliance with the Academy Trust Handbook.
- Collect, assess and analyse information required for annual statutory financial reporting.
- Lead the preparation of the Trust's statutory accounts in conjunction with the Trust's auditors, complying with the Academies Accounts Direction.
- Support and advise trustees on the development of a programme of internal scrutiny in-line with the Academy Trust Handbook.
- Liaise, on behalf of the Trust Leader, with the relevant funding bodies on financial matters, and ensure that all returns are completed correctly and submitted within required deadlines.
- Promote accounting concepts across the Trust such as accurate classification of revenue and capital expenditure, accruals accounting and materiality as part of an overall system of robust financial governance.

Income

- To prepare annual income budgets in liaison with the COO.
- Ensure the Trust maximises its income streams, achieves economy of scale and best value in liaison with the COO.
- Identify income opportunities and grants and formulate bids as appropriate.

Fixed Assets

- To oversee maintenance of the Trust's fixed asset registers and ensure these are reviewed regularly.

Growth

- Lead on the due diligence process for growth, In liaison with the COO.

Management

- Promote a finance culture across the Trust which is professional, supportive and service driven.
- Provide leadership and mentoring to all team members, including training, managing workloads, delegating and creating an effective shared service.
- Deputise for colleagues as necessary.
- Provide specialist financial advice to the executive team on various specific and general service developments.
- To keep abreast of regulatory changes and best practice initiatives by undertaking an appropriate programme of continuing professional development and attendance at, and contribution to, practitioner groups.
- Support the team in implementing and maintaining consistent financial reporting across the Trust to aid consolidated accounts reporting and preparation.

COMMON ROLES OF ALL TRUST MEMBERS

Leadership: Vision and Values

- Lead by example, providing inspiration and motivation, and embody for the students, staff, governors, parents and wider community the vision, purpose and leadership of the Trust.
- To ensure equal opportunities for all.
- To be committed to safeguarding and to promoting the welfare of all young people.
- To assist in the development of a culture and environment in which young people thrive and to drive forward innovation.
- To drive educational standards, promote life-long learning and continually improve outcomes for all.
- Lead and contribute to an ethos in the Trust where well-being and respect are at the heart of the Trust and each student is valued and nurtured to develop personally and educationally.

Leading and Managing Others and Self

- Take responsibility for the day-to-day management of designated staff Develop and maintain a culture of high expectations for self and others.
- Ensure own and team deadlines are met.
- Motivate and develop the finance team ensuring positive relations and professional behaviours.
- Regularly review own practice and behaviours, set personal targets and take responsibility for own development.
- Work within the Trust's Health and Safety policy to ensure a safe working environment for staff, students and visitors.
- Actively engage in the performance review process.
- Maintain high professional standards of attendance, punctuality, appearance, conduct and positive, courteous relations with students, parents, colleagues and visitors.
- Adhere to Trust policies and procedures.

Additional requirements

- The post holder must demonstrate a flexible approach in the delivery of work. Consequently, the post holder may be required to perform work not specifically identified in the job profile but which is in line with the general level of scope, grade and responsibilities of the post.
- Carry out the work of the job in a way that is consistent with the culture, ethos, Equalities and Inclusion policies of the school and the University Schools Trust.
- The Trust is committed to safeguarding, child protection and promoting the welfare of children and young people and expects all staff and volunteers to share in this commitment, recording and reporting all concerns to the appropriate person and disclosures to the relevant professional.
- Undertake all duties with due regard to the provisions of health and safety regulations and legislation, Data Protection/GDPR, the Trust's Equal Opportunities policy and Use of the ICT policy.
- Complete any training required to improve performance and take part in the school performance management systems (where relevant).
- Undertake such other duties as are commensurate with the post and which may reasonably be required by the Trust.

JOB DESCRIPTION AGREEMENT

The post holder will be line managed and appraisal managed by: **Trust Leader**

This Job Description may be reviewed at the end of the academic year or earlier if necessary. In addition, it may be amended at any time after consultation with the post holder.

Person Specification

Chief Finance Officer

| Qualifications | Essential | Desirable |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|-----------|
| An accountancy qualification from an appropriate professional body such as ICAEW, ACCA, CIMA or CIPFA. | | ✓ |
| A minimum of Grade C in English and Maths GCSE level or equivalent. | ✓ | |
| A first degree. | | ✓ |
| Experience & Knowledge | Essential | Desirable |
| Proven experience of leading finance functions in a similar role. | ✓ | |
| Ability to demonstrate qualities required by the job specification | ✓ | |
| Demonstrate a high level of competence in using ICT, where required in the job specification | ✓ | |
| Strong commercial acumen that has been demonstrated in providing financial and commercial effectiveness in a resource-constrained environment. | ✓ | |
| Wide-ranging core experience and commercial skills encompassing the following: budgeting and planning, strong cash-flow management, managing capital expenditure and procurement, creating a strong control environment around management and statutory reporting, strong financial and management information analysis skills and able to disseminate timely, accurate and relevant reports to key stakeholders. | ✓ | |
| Previous experience in building effective teams, developing staff and managing external business relationships and networks. | ✓ | |
| Exposure to regulated business environments with a demonstrable track record of having managed risk in a proactive and pragmatic way. | ✓ | |

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Person Specification *continued*

| Effective | Essential | Desirable |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|-----------|
| A demonstrable flexible, positive and proactive approach to the delivery of work objectives and priorities | ✓ | |
| Within the remit of the role, an ability to turn strategy into action to support the development of the financial functions of the Trust | ✓ | |
| A strong customer focus to ensure the timely delivery of agreed outcomes | ✓ | |
| Ability to quickly build relationships, gain the confidence of, and communicate effectively with, all levels of stakeholders | ✓ | |
| Ability to rise to complex challenges, effectively manage own emotions and demonstrate an appropriate degree of personal and professional resilience as appropriate to the level of the role | ✓ | |
| Effective presentation and negotiating skills to support the achievement of change at a trust-wide level. | ✓ | |
| A self-starter who can work independently, is well organised with the ability to meet agreed targets and challenging deadlines | ✓ | |
| A strong team worker who can demonstrate an enabling style of leadership, be inspirational and motivational | ✓ | |
| A competent user of Microsoft Word, Excel, PowerPoint and other ICT based applications as necessary. | ✓ | |
| Other | Essential | Desirable |
| This post requires a satisfactory Enhanced DBS Disclosure | ✓ | |
| Demonstrable commitment to their own continual professional development | ✓ | |