

The Dunstan Catholic Educational Trust

A charitable company limited by guarantee. Registered in England and Wales under company no. 13306248. Registered office: Alexander House, 160 Pennywell Road, Bristol BS5 0TX



Chief Financial Officer

Recruitment Pack

June 2022

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Dear Applicant,

Chief Financial Officer

Thank you for your interest in the Chief Financial Officer (CFO) role for a start date as soon as possible.

This is an exciting time to join us, the DCET opened on 1 March 2022 as one of the first Catholic multi-academy Trust's (MATs) in Clifton Diocese. The DCET currently oversees six primary schools based in Somerset and North Somerset with a combined total of circa 1200 pupils, 200 staff and £5m budget. However, the Bishop's ambitious growth strategy means it is expected to expand quickly over the next few years to over 20 mixed phase schools. The Trust is already engaged in conversations about schools joining in 2023. More details about the Trust, its vision, values and schools can be found via: [The Dunstan Catholic Educational Trust \(thedcet.com\)](https://thedcet.com)

The Trust seeks to appoint a qualified accountant as a permanent full-time postholder with rights to work in the UK as soon as possible. In the first instance, please share your CV with me via HTaylor@theDcet.com you do NOT have to be a Catholic to apply but would be expected to uphold its ethos. There is some flexibility for the right person to start initially on a 0.8 or nine-day fortnight basis rising to full-time to meet business demand and Trust growth. The postholder will need to be a qualified accountant and experienced operations/business leader with a proven track record within a growing and complex organisation operating on multi-sites. The DCET CFO will have delegated leadership responsibility for the finance and business operations of the Trust as a whole and ensuring public funds are well spent in delivering the Trust's vision, ethos and strategy in the best interests of all pupils. You will be the Trust's principal financial adviser and contribute to the development and delivery of highly effective and efficient governance, financial strategy and policy, financial management, internal controls and assurance processes which ensure compliance with the Trust's statutory requirements as a charitable company funded and regulated by the Department for Education.

As the Trust's most senior non-teaching employee, you will be part of Executive Leadership Team committed to working openly and ethically with the CEO and Trust Board, line managing central team staff and collaborating with other key stakeholders in the best interests of all children within and beyond DCET. You will have a major role in supporting delivery of the Bishop's growth plan through effective advocacy, stakeholder engagement and completion of due diligence for prospective new or joining schools to enable informed decision making by the Trust Board. This is a post that will change over time; the post holder will be responsive and proactive in the context of organisational needs, strategic priorities and growth.

What We Can Offer You

- Employer contributions to the Local Government Pension Scheme
- Excellent career development opportunities as the Trust grows
- Handover and transition support.



- Access to continuous professional development by engaging in a trust-to-trust support and/or MAT CFO buddy/coaching and mentoring arrangement. The latter could be helpful particularly if you have not worked in the education sector previously.
- Annual leave of 30 days (pro rata) plus bank holidays
- Hybrid working to offer a flexible approach to work life balance

Next Steps

Stage 1 – If you are interested in the role, in the first instance please send me your up-to-date CV and contact details via HTaylor@theDcet.com. Please also advise if you would like an informal conversation before moving to the next stage.

Stage 2 – to apply formally and comply with the Trust’s safeguarding policy all applicants will need to complete a CES model application for **Support Staff** obtainable at: [Vacancies \(thedcet.com\)](https://thedcet.com) and email it to me via HTaylor@theDcet.com

The Trust’s privacy notice can be found via: [Privacy and Cookie Policy \(thedcet.com\)](https://thedcet.com)

The Trust is committed to equality, diversity and inclusion and safeguarding. As inclusive employer applications are welcomed from all. Any appointment will be subject to the satisfactory completion of pre-employment checks including an enhanced Disclosure and Barring Service (DBS) check and Section 128 clearance.

Finally, the Somerset area in the South West of England is a fantastic place to live and work. It is home to many natural and cultural sites of interest including beautiful beaches, harbours and coastal walking paths, Cheddar Gorge, Glastonbury Festival, the City of Wells, Bridgwater and Taunton Canal, willows and wetlands. Find out more via: [Somerset | Accommodation | Attractions | Things to do - Visit Somerset](#)

I look forward to hearing from you.

Kind regards,

HTaylor

Helen Taylor
Chief Executive Officer



Chief Financial Officer Job Description

Post:	Chief Financial Officer
Contract:	Permanent, full-time all year round (with flexibility for the right candidate)
Salary:	£55 – 75k negotiable depending on experience
Base:	At a Trust location with travel to schools and flexible working from home
Accountable to:	Chief Executive Officer (CEO)
Reports to:	CEO, Members, Trust Board and relevant trust committee(s)
Line Manages:	Central Service Team
Start Date:	As soon as possible

Responsible for: The CFO of The Dunstan Catholic Educational Trust (DCET) will ensure that scalable systems, processes, KPIs, and controls are in place for leading the financial and business operations of The Dunstan Catholic Educational Trust in line with its Catholic ethos and the Bishop's ambitious growth plan. As a member of the Trust's Executive Team they will support the CEO in overseeing delivery of the Trust Board's vision and strategy, and ensure compliance with all agreed policy, statutory and contractual requirements as a charitable company regulated by the Department for Education.

Job Summary:

The CFO is the Trust's principal financial adviser with delegated leadership responsibility for the finance and business operations across the organisation, ensuring public funds are spent well in delivering the Trust's vision, ethos, and strategy in the best interests of all pupils. The CFO will work openly with the CEO, Members, the Trust Board and trust committees to contribute to the development and delivery of highly effective and efficient governance. This includes, but is not limited to, financial strategy and policy, internal controls/KPIs, risk 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 development of the newly set up Trust in the short-term, and in the medium term delivery of the Bishop's growth plan. This aims for three MATs (northern, central and southern) to be open by 2025. DCET would form the Southern MAT expected to grow from six Catholic primary schools in 2022 to twenty-three Catholic primary and three Catholic secondary schools serving a combined total of circa 7k pupils over the next three years. As an increasingly complex organisation this will require the post-holder to promote effective advocacy, stakeholder engagement and due diligence for prospective new or joining schools to enable informed decision making by the Trust Board. They will also help shape the further long-term development of the Trust post 2025.

Main Duties and Responsibilities the CFO will be accountable for:

- 1 Uphold the Trust's Catholic ethos.
- 2 To identify best-practise in all areas of the Trust's finance and business operations and use this knowledge to drive excellence in all areas of the Trust's finance and business operations.



- 3 Support the Trust's Accounting Officer by demanding the highest standards of probity, propriety, and value for money in managing public funds from all stakeholders (internal and external).
- 4 Act as the Trust's principal financial adviser to the Trust Board to ensure financial viability and sustainability, reporting on KPIs and facilitating informed decision making.
- 5 Ensure compliance with the Trust's statutory and contractual requirements as a charitable company regulated and funded by the Department for Education.

Strategy

- 6 Enable delivery of the Trust's vision through efficiently resourced and measurable strategic plans underpinned by knowledge of the sector, diocesan directives, sound financial planning and KPIs.
- 7 Develop, recruit, and retain the finance and business capability and capacity required to drive improved financial performance and efficiency across the Trust and enable future growth.
- 8 Lead the completion of due diligence for prospective new or joining schools to enable informed decision making by the Trust Board.
- 9 Act as an advocate and ambassador for the Trust to build a strong, positive reputation for the Trust as the education provider and employer of choice.

Financial Leadership and Regulatory Compliance

- 10 Oversee implementation of robust financial management and internal controls across the trust.
- 11 Embed high standards of probity, propriety, and value for money in managing public funds.
- 12 Take a hands-on involvement to support colleagues with financial management, developing skills and empowering them.
- 13 Oversee the preparation of financial/budget plans to ensure the Trust remains a going concern.
- 14 Oversee the development/maintenance of the Trust's business continuity plan and risk register.
- 15 Support the external auditors' production of accurate audited accounts for approval, publication and filing at Companies House.
- 16 Ensure internal audit checks are conducted by someone independent, suitably qualified, and experienced, and the resulting report and recommendations are implemented in a timely manner.
- 17 Actively seek opportunities to save costs and generate additional income and donations.
- 18 Ensure the Trust has adequate insurance or is a member of DfE's risk protection arrangement.
- 19 Oversee the procurement of external specialist support to ensure Trust compliance with relevant legislation and guidance.
- 20 Ensure the Trust and its Board is compliant with its statutory and contractual duties.

People and Performance

- 21 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.
- 22 Line manage the Central Service Team in accordance with Trust policy.
- 23 Support the development of a financially sustainable People or Workforce Strategy to build capacity for future growth and succession planning, particularly for key roles.
- 24 Support the CEO in the management of evidence based, performance management and pay.



Governance

- 25 Report to the Trust Board and its finance and audit committee(s).
- 26 Work closely with the Trust Board Chair and relevant Trust Committee Chair/s to secure a positive, professional working relationship between Members, Directors, Local Governors, and staff.
- 27 Model the production of high-quality written reporting and performance data (KPIs) in a timely manner to the Trust Board and its committees; ensuring information is clear and accessible to enable well-informed decisions in the best interests of children.
- 28 Lead the development of the Trust's Scheme of Financial Delegation and ensure that it, and the Trust Board's Scheme of Delegation (for governance), is fully and rigorously implemented.

General information

The post holder will be required to comply with DCET's policies and procedures.

The postholder will promote DCET's Health and Safety at work policy and ensure implementation is effective within their areas of responsibility.

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.

Review

This Job Description covers the main duties and responsibilities of the job and will be subject to review and amendment, in consultation with the post holder, to meet the changing needs of the organisation.

Other activities commensurate with this Job Description may from time to time be undertaken by the post holder and as directed by the CEO or DCET Trust Board.



Chief Financial Officer Person Specification

Professional Qualities, Knowledge and Experience	E	D
Key: E = Essential and D = Desirable		
Implement appropriate management, business and strategic planning techniques	√	
Provide clear, authoritative and impartial professional advice, objective financial analysis and interpretation of complex situations	√	
Apply the principles of corporate and charitable finance, economics, risk management and accounting.	√	
Support collective ownership of strategy, risks and delivery.	√	
Balance conflicting pressures and needs, including short and long term trade-offs.	√	
Demonstrate strong commitment to innovation and performance improvement.	√	
Demonstrate a willingness to take and adhere to difficult decisions – even under pressure	√	
Create, communicate and implement and agree with the CEO and Board a vision for the finance function and ensure that there is a clear understanding of what the finance function will provide, the timescales, format and content.	√	
Leadership of a regulated, complex, multi-site organisation.	√	
Knowledge of child protection, safer recruitment, safeguarding and prevent policy and procedures.		√
Leadership of significant organisational reform and change processes including growth.		√
Highly developed skills in people and performance management including escalation of HR related policy and procedures to ensure robust accountability for performance.	√	
In-depth knowledge and strategic awareness of the education sector including national policy, diocesan directives, and the local operating context.		√
Strong financial acumen and a track record of financial and resource management which delivers financial KPIs, robust internal controls and value for money.	√	
Technical knowledge of accounts management, reporting, compliance, and the ability to identify appropriate journals, transactions etc	√	



Professional Qualities, Knowledge and Experience	E	D
Key: E = Essential and D = Desirable		
Good understanding of regulatory requirements, e.g VAT registration, partial exemption, Corporation Tax issues facing MATs etc.	√	
Understanding and modelling support for the strategic role of the Members, Trust Board and its committees.	√	
Experience of leading collaborative partnerships within and beyond the organisation, working closely with external stakeholders and delivery partners.	√	
Ensure, when necessary, that outside expertise is called upon for specialist advice not available within the finance function.	√	
Understand public service finance and its regulatory environment.		√
Maintain a presence in national professional networks and, through these and other means, ensure an up-to-date overview of sector policies and developments is held.	√	
Abilities and Aptitude		
Ability to lead by example with integrity and a strong moral compass to do what's right for all children.	√	
Model and promote high standards of personal and professional conduct in line with Nolan Principles and Ethical Leadership Framework.	√	
Role model, energetic, determined, positive, robust, and resilient leadership.	√	
Apply relevant statutory, regulatory, and professional standards both personal and organisational.	√	
Demonstrate a strong desire to innovate and add value	√	
Challenge effectively, and give and receive constructive feedback	√	
Ability and willingness to work collaboratively and openly with directors to inform decision making in the best interests of pupils.	√	
Network effectively within the organisation to ensure awareness of all material business decisions to which CFO input may be necessary.	√	
Ability to unite, inspire and secure the loyalty, respect and confidence of key stakeholders to enhance the Trust's reputation and profile.	√	
Ability to think strategically and creatively to facilitate delivery of the Trust's vision and strategy and growth plan.	√	



Professional Qualities, Knowledge and Experience	E	D
Key: E = Essential and D = Desirable		
Demonstrate tenacity in advocating the Trust’s vision, values and ambition for every child and member of staff.	√	
Ability to adapt to changing priorities to manage own time and delegate effectively to maximise impact and achievement and appreciate the importance of an effective work/life balance.	√	
Ability to self-reflect and moderate own emotions to remain calm and resilient when facing challenge, adversity, or pressure.	√	
Ability to be an articulate and approachable communicator and presenter who can adapt to diverse needs and use IT proficiently.	√	
Ability to analyse information and data from a range of sources and precis to communicate key points to other leaders and stakeholders.	√	
Demonstrate a commitment to equality in policy and practice.	√	
Has a passion for continual personal and professional development for self and others.	√	
Qualifications		
Qualified Accountant and current membership of a relevant professional body i.e. ICAEW, ACCA, CIMA or CIPFA	√	
Financial and/or operational/business leadership within a multi-academy trust.		√