



PETERBOROUGH KEYS
ACADEMIES TRUST

CHIEF FINANCE & OPERATING OFFICER (CFOO)
Candidate Pack



Welcome Letter

Dear Candidate,

Thank you for your interest in this very important role for our multi academy trust. PKAT is at an exciting point in its development; a clear strategic plan for growth is in place and the organisation is in good financial and educational health. My appointment in September as full-time CEO was one part of that growth plan and I have since made an appointment for a Director of Primary Education, as that is the phase in which we anticipate initial growth.

This new role of Chief Financial and Operating Officer will be absolutely central to our success moving forwards. We have built solid support structures in finance, facilities, compliance and IT, with strong new appointments, and we need a CFOO to take the helm in this regard. The person appointed will enjoy operating at executive team level and be comfortable in interactions with our Trust board. Equally they will be a strong communicator and will win the respect of colleagues engaged in support or education roles across the organisation.

An added attraction will be the opportunity to move into our new PKAT central offices which will come into operation in January! We anticipate that being a very pleasant working environment which also provides a good central location from which to visit our schools (all within a few minutes drive) as appropriate. We consider ourselves to be friendly and enjoy a laugh, whilst also all striving to really make a difference to the lives of the children we educate, the people who work here and the communities we serve. Holding such values as central allows us to be flexible and resilient in facing the challenges ahead.

Working together has allowed us to use the expertise across our 5 schools to meet our common goals to give our pupils and students an inclusive, innovative learning community that respects and benefits everyone and has aspirational plans for the future.

From the moment children join us they begin a journey where the curriculum in all schools is linked to our 5 Keys: Learning, Personal Best, Opportunity, Community and Leadership.

Through our iLearn Project we are unlocking the digital potential to transform learning in both the classroom and at home. All teaching staff in the Trust have their own iPads through the iLearn Project and are benefitting from an on-going, comprehensive training programme from Apple educators. One-one devices are currently on issue to pupils and students in Years 5,6,10,11,12 and 13.



**PETERBOROUGH KEYS
ACADEMIES TRUST**

Our Trust developed a new curriculum for Year 7 to ensure the transition from Primary to Secondary school was planned the support the best outcomes for students and encourage independent and reflective learners through the development of exhibitions and student led conferences. This is now a fully embedded part of the offer for our PKAT learners.

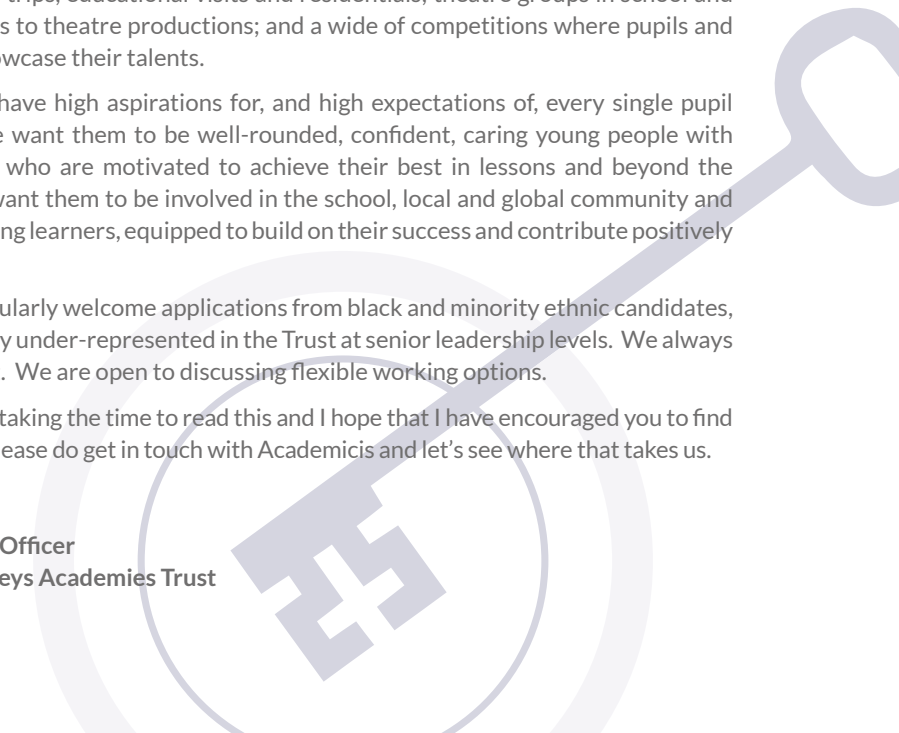
Our PKAT Young Explorers programme replicates the Duke of Edinburgh scheme for all Year 5 pupils across the Trust and forms part of the Year 5 curriculum. Our rich offer for all the children in our Trust also includes: a wide range of sporting activities and undertaking sports leadership courses; University visits in both Key Stage 2 and Key Stage 5; day trips, educational visits and residential; theatre groups in school and educational visits to theatre productions; and a wide of competitions where pupils and students can showcase their talents.

All in our Trust have high aspirations for, and high expectations of, every single pupil and student. We want them to be well-rounded, confident, caring young people with leadership skills who are motivated to achieve their best in lessons and beyond the classroom. We want them to be involved in the school, local and global community and leave us as life-long learners, equipped to build on their success and contribute positively to our future.

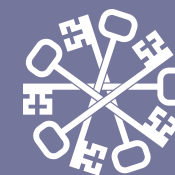
We would particularly welcome applications from black and minority ethnic candidates, who are currently under-represented in the Trust at senior leadership levels. We always appoint on merit. We are open to discussing flexible working options.

Thank you again taking the time to read this and I hope that I have encouraged you to find out more. If so, please do get in touch with Academicis and let's see where that takes us.

Dr Ian Young
Chief Executive Officer
Peterborough Keys Academies Trust



Job Description



PETERBOROUGH KEYS
ACADEMIES TRUST

The Board of Trustees is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment.

CHIEF FINANCE & OPERATING OFFICER (CFOO)

Location: Trust Offices, Ledbury Road, Peterborough PE3 9PN
with some local travel between schools within the academy

Accountable: Chief Executive Officer

Pay: Circa £100,000 per annum

Job Description



PETERBOROUGH KEYS
ACADEMIES TRUST

Purpose of Job

The CFOO is responsible for the non-teaching business and financial operations of the Trust and for ensuring compliance with all relevant regulations and statutory requirements. They will lead and manage the Trust's corporate service functions including Finance, HR, IT and Estates & Compliance, and by supporting commercial decision-making will enable the Trust to work effectively towards the delivery of its vision, aims and agreed strategic direction.



Job Description continued



PETERBOROUGH KEYS
ACADEMIES TRUST

Accountabilities

Finance, Audit and Risk

The CFOO will be accountable for maintaining robust financial management of the Trust and its academies. The CFOO will:

1. Ensure the Trust complies with its obligations in accordance with the funding agreements, the Academy Trust Handbook and the Trust's Finance Manual which should be regularly reviewed by the Financial Controller (FiCo) and updated to reflect changed regulations and procedures
2. Advise and support the CEO in the financial aspects of their responsibilities as Trust Accounting Officer
3. Through the FiCo ensure that the Trust follows best practice in terms of financial governance, ensuring the probity and legislative compliance, of all financial transactions, including the integrity and suitability of all control mechanisms (audit and risk management).
4. Oversee the consistent cross-Trust delivery of annual and medium-term budget plans, timelines, periodic forecasts, and funding commentaries
5. Supported by the FiCo, ensure preparation, completion and submission financial returns and reports as required by Trutees, the Executive Team, the Department for Education, the Education and Skills Funding Agency, the Charities Commission and Companies House
6. Lead the Trust approach to Integrated Curriculum and Financial Planning (ICFP) and analysis of View my Financial Insights
7. Manage and develop the Trust's financial systems, including managing user access, providing training, considering future system developments, and generating reports
8. Support the approach of forming the Trust Central Charge and all central budget assumptions assigned to school-level budgets.
9. Ensure the Trust's approach to internal and external scrutiny is fit for purpose and in line with statutory guidelines, acting as the main contact for internal and external audit and monitoring implementation of audit points
10. Oversee the preparation of the Annual Report and Financial Statements, taking responsibility for the completion and submission of returns in line with prescribed standards, timelines and the Academies Accounts Direction.
11. Proactively manage the Trust's relationship with its bankers, to ensure that appropriate and efficient systems are in place for the Trust's accounting procedures.
12. Proactively manage the cash position of the Trust and its operating activities, reporting regularly on this aspect of financial management to the Trustees.
13. Produce and implement appropriate policies and procedures for the procurement, depreciation, and disposal of all assets for the Trust.
14. Keep abreast of funding conditions and distil information to ensure maximum impact is derived
15. Oversee the Finance Manager acting as main point of contact for PKAT with the two pension schemes, dealing with pension queries as appropriate, prepare and sign off the Teachers' Pensions End of Year Certificate and completing pension forms as employer representative
16. Prepare high-quality reports for, and attend the meeting of the Finance, Audit & Risk sub-committee of the Board of Trustees



Job Description continued



PETERBOROUGH KEYS
ACADEMIES TRUST



People & Infrastructure

The CFOO will be accountable for the efficient and effective business functions of the Trust and will:

1. Lead, develop and implement the Trust Estates Strategy including the oversight of prioritisation, funding and delivery of capital schemes, reducing the carbon footprint of the Trust, and tactical delivery of the Estates Plan.
2. Lead, develop and implement the Trust ICT Strategy including embedding the Trust ICT Services Team, providing the commercial and financial steering on current and future ICT projects, and the tactical delivery of the ICT Plan.
3. Lead the development of a People Strategy in conjunction with the CEO including the evaluation of the Trust's HR processes, policies, resources, strategic partnerships and employee deal.
4. Lead, develop and implement a systems roadmap in-line with the current and future system needs of the organisation, aligned with the ICT Strategy
5. Lead, develop and implement a Trust Catering Strategy to deliver catering in a group-managed manner
6. Lead the Trust's Health & Safety approach including audit, training, strategic partnerships and statutory compliance
7. Lead the strategic relationship between the Trust and the PFI stakeholders
8. Lead the transition from school policies to Trust policies
9. Lead ownership and implementation of the Trust Pay Policy
10. Oversee the Trust's approach, partnerships, policies and procedures in relation to GDPR
11. Lead best value procurement across the Trust ensuring all policies and procedures for buying and ordering supplies and services are robust, fully compliant and operate highly efficiently, generating economies of scale and value for money through harmonisation.
12. Lead the effective delivery of payroll services for the Trust and its schools
13. Manage Trust contracts including insurance, HR advisory, utilities, MFDs, iPads and cleaning.
14. Manage the Trust Estates & Compliance Manager, ICT Services team, and Finance team
15. Prepare high-quality reports for, and attend the meeting of the People & Infrastructure sub-committee of the Board of Trustees

Job Description continued



PETERBOROUGH KEYS
ACADEMIES TRUST

Strategy, Leadership and Management

The CFOO will think strategically and will provide motivational leadership at all levels of the Trust's organisation. The CFOO will:

1. Provide strategic guidance and leadership of all the Trust's business functions within the Scheme of Delegation, advising the Trust Executive Team, Trustees, Headteachers and Business Managers on all business matters relating to the Trust.
2. Contribute fully to wider strategic planning by providing analysis of complex information and forming solutions and guidance.
3. Lead the development of the relationship between the Trust central business team and the Trust schools
4. Lead the maturation of the Trust's central business functions, aligned to strategy, ensuring they are fit for purpose and provide a high quality, cost effective and efficient support enabling schools to focus on the quality of education.
5. Continually review and improve the existing systems, processes and policies ensuring they are streamlined, efficient robust, compliant and support routines and processes within the Trust and its schools
6. Ensure the business systems and routines best support the work of the schools and are an attractive draw for schools wishing to join the Trust
7. Lead on the management of the Trust's business risks and their effective mitigation ensuring appropriate action is taken to address inherent risks, problems, and irregularities
8. Monitor and evaluate the work, capacities and skill set of the central business team and be responsible for team members' personal development
9. Lead on leveraging the financial and commercial benefits of the Trust and ensuring all stakeholders are appraised of the value added
10. Provide appropriate and timely reports to the Trust board and other Trust leaders to support effective leadership and governance
11. Act as a representative for the Trust in external networks and forums, raising the profile of the Trust, engaging with the wider sector, and ensuring that the Trust is horizon-scanning and alert to information, changes and opportunities that could affect its work
12. Conduct due diligence on schools that wish to join the Trust, and actively participate in their pre-boarding and onboarding.
13. Prepare high-quality reports for, and attend the meeting of the Board of Trustees



Job Description continued



PETERBOROUGH KEYS
ACADEMIES TRUST

General Responsibilities

1. Contribute to and uphold the overall vision, aims and values of the Trust.
2. Recognise own strengths and expertise and use these to inspire, advise and support others.
3. Promote teamwork, working in partnership to ensure effective working relations.
4. Treat all users of the schools within the Trust with courtesy and consideration.
5. Be aware and comply with equal opportunities and all Trust policies at all times.
6. Respond to complex requests and correspondence from stakeholders and external agencies.
7. Participate in training and other learning activities and performance development as required.
8. Maintain confidentiality at all times in respect of Trust-related matters and to prevent disclosure of confidential and sensitive information.
9. Any other duties commensurate with the senior level of this post.



Person Specification



PETERBOROUGH KEYS
ACADEMIES TRUST

| Criteria | Standard | Essential | Desirable |
|----------------|--|-----------|-----------|
| Qualifications | <ul style="list-style-type: none"> Professional Accountancy qualification, e.g., ICAEW, CIMA, ACCA or CIPFA | • | |
| | <ul style="list-style-type: none"> Either Level 7 in Academy Financial & Operational Leadership, or Certificate in the Financial Reporting of Academies (CertFRA) or Masters in Business Administration | | • |
| | <ul style="list-style-type: none"> Degree in a finance or business-related discipline | • | |
| Experience | <ul style="list-style-type: none"> Senior resource management and strategic leadership experience, with accountability for complex resource base | • | |
| | <ul style="list-style-type: none"> Proven track record of successful leadership and building effective teams | • | |
| | <ul style="list-style-type: none"> Significant experience of leading and managing budgets; working with stakeholders to develop strong financial understanding across an organisation | • | |
| | <ul style="list-style-type: none"> Experience of developing and managing external relationships with professional and regulatory bodies | • | |
| | <ul style="list-style-type: none"> Evidence of entrepreneurialism and innovation, with an ability to identify commercial opportunities to maximize income | • | |
| | <ul style="list-style-type: none"> Experience of working within an educational setting | | • |
| | <ul style="list-style-type: none"> Experience of working with Governors, Trustees, or similar | | • |
| | <ul style="list-style-type: none"> Experience leading one or more business service discipline such as IT, Finance, HR, Estates and Administration | • | |
| | <ul style="list-style-type: none"> Experience in obtaining additional funding | | • |
| Knowledge | <ul style="list-style-type: none"> Detailed and up-to-date knowledge of accountancy and professional codes of practice evidenced by meeting CPD requirements | • | |
| | <ul style="list-style-type: none"> Advanced knowledge of statutory requirements and funding strategies | • | |
| | <ul style="list-style-type: none"> Substantial knowledge and experience of managing pro-procurement and contracts | • | |
| | <ul style="list-style-type: none"> Proven awareness and respect for the highly sensitive status of information and its confidentiality | • | |
| | <ul style="list-style-type: none"> Understanding of employer pension responsibilities | | • |
| | <ul style="list-style-type: none"> Up-to-date knowledge of Data Protection and Freedom of Information Acts | | • |
| | <ul style="list-style-type: none"> Knowledge of HR policy, practice and legislation | | • |
| | <ul style="list-style-type: none"> Demonstrable commercial acumen | • | |
| | <ul style="list-style-type: none"> An understanding / experience of working with external auditors and agencies | • | |

Person Specification continued



PETERBOROUGH KEYS
ACADEMIES TRUST

| Criteria | Standard | Essential | Desirable |
|--|--|-----------|-----------|
| Skills & Qualities | <ul style="list-style-type: none"> Proficient in the use of MS Office applications and Financial Information Systems | • | |
| | <ul style="list-style-type: none"> Strong judgement and the ability to look at risk analysis through a commercial as well as financial lens | • | |
| | <ul style="list-style-type: none"> Excellent analytical skills and sound judgement | • | |
| | <ul style="list-style-type: none"> Ability to direct a multi-disciplinary team effectively and demonstrate excellent leadership skills | • | |
| | <ul style="list-style-type: none"> Ability to interpret complex financial information, advice, and statutes and to devise policy / practice autonomously considering these | • | |
| | <ul style="list-style-type: none"> Ability to manage own workload without direction, having the ability to prioritize to meet tight deadlines | • | |
| | <ul style="list-style-type: none"> Highly effective communications skills and ability to influence and negotiate effectively | • | |
| | <ul style="list-style-type: none"> Ability to present complex information to a varied audience | • | |
| | <ul style="list-style-type: none"> High ethical standards, strong moral purpose and influencing skills with the ability to engage effectively with all staff across the Trust and Board of Trustees | • | |
| | <ul style="list-style-type: none"> Ability to persuade, motivate, negotiate and influence | • | |
| | <ul style="list-style-type: none"> Excellent written and presentation skills | • | |
| | <ul style="list-style-type: none"> Comfortable and confident to represent both the Board of Trustees and CEO at external meetings and in the wider community, using initiative and discretion as required | • | |
| | <ul style="list-style-type: none"> Ability to work autonomously and flexibly | • | |
| | <ul style="list-style-type: none"> Ability to influence strategic decision making | • | |
| | <ul style="list-style-type: none"> The jobholder may be required to apply resilience when dealing with emotions / challenges from staff, suppliers, and contractors on an infrequent basis | • | |
| | <ul style="list-style-type: none"> A belief that everyone can benefit from, and has entitlement to high quality education opportunities | • | |
| | <ul style="list-style-type: none"> A personal commitment to lifelong learning and continuous professional development | • | |
| | <ul style="list-style-type: none"> Commitment to high standards, best value, and continuous improvement | • | |
| | <ul style="list-style-type: none"> Ability to be reflective and self-critical | • | |
| | <ul style="list-style-type: none"> Proactive and self-motivated | • | |
| <ul style="list-style-type: none"> Resolution and problem solving | • | | |

This job description and person specification will be reviewed periodically. This job description sets out the main duties to be covered in respect of the paid allowance at the date when it was drawn up. Such duties may vary from time to time without changing the general character of the post or the level of responsibility entailed. Such variations are a common occurrence and cannot themselves justify Trustee consideration of revising the allowance remunerated



How to apply:

If you would like to discover more about this exciting opportunity, need any further information or you wish to have an informal discussion, please contact our retained consultant at Academicis: Kerri Wiseman: kwiseman@academicis.co.uk or 01223 907979/07733 628155

Please email your application to:

Kerri Wiseman: kwiseman@academicis.co.uk

Closing date: Noon, Wednesday 14th December 2022

Shortlisting date: Friday 16th December 2022

Interview: 19th & 20th December 2022

