

Job Description and Person Specification

Chief Financial Officer

LUTTERWORTH HIGH SCHOOL | AN 11~ 16 ACADEMY TRUST

JOB DESCRIPTION

Chief Financial Officer

Reporting to: Headteacher.

Responsible for: Management of school finances and the Finance Officer.

Liaising with: Headteacher, Senior Leadership Team, Governors, Data Manager, budget holders, teachers and support staff.

Working Time: 37 hrs per week / 52 weeks per year

Salary/Grade: 13-14

Disclosure level: Enhanced.

Post Purpose:

- As a member of the Senior Leadership Team, take the strategic lead in the effective and efficient development, provision and operation of financial services for the school, ensuring best practice and financial stability and growth.
- To provide clear information, advice and recommendations to the Headteacher, Senior Colleagues and Governors regarding the strategic development of financial services, the utilisation of school assets and the development of the school's business activity, to help ensure the best possible learning environment for students.
- To take responsibility for ensuring financial compliance with the statutory and legal requirements of the Trust.

Main duties and responsibilities

- To serve as a member of the Senior Leadership Team and to play a full part as a member of this team.
- To play a major role in contributing to the overall organisation, management and direction of the school.
- To maintain oversight of designated areas of whole school organisation and development and to take responsibility for a range of specific duties and tasks, as outlined below.
- To share responsibility, with the Headteacher and other members of the Senior Leadership Team, for monitoring and evaluating school progress against the stated objectives and targets of the School Development Plan in specific areas and for taking any additional actions as may be agreed to be necessary.
- To attend meetings, including Governing Board meetings, as necessary, in fulfilment of the responsibilities of the post.
- To comply with all school policies, procedures and systems, in finance, best value, health and safety, equal opportunities and data protection requirements.
- To prepare policies for financial standards and financial regulations.
- To set objectives for financial management. To monitor progress, and to advise on any necessary remedial actions. To participate in the school annual review scheme and in relevant training opportunities.

Financial Management

- To be responsible for the development and implementation of the school's financial and service support policies, systems and procedures; ensuring that they adhere to agreed policies, relevant legislation, financial regulations and standing orders; and to develop new systems as required, ensuring that service support staffing is provided for new systems.

- To develop, implement and revise financial systems necessary to support efficiently the functions of the school and to meet the financial responsibilities statutorily delegated or devolved to the school.
- To prepare and monitor, in consultation with the Headteacher, the annual school budget, to prepare analyses as required, and to prepare and present financial statements and reports in accordance with current school requirements, including clear and informative presentations to the Governing Board, committees, and the Senior Leadership Team.
- To be responsible for Extended Services in consultation with the Headteacher. Analyses of income and expenditure for lettings, sports activities and to provide other such information as may be required by external funding bodies.
- To undertake financial planning and to prepare annual estimates of expenditure and income for outside organisations.
- To advise school budget holders of their budget allocations and to ensure that they monitor and manage their budgets effectively.
- To ensure that quotations for the supply of goods and services to the school are obtained; that prices are negotiated with suppliers and contractors as required; and that goods and services are ordered, received and paid for in accordance with current procedures.
- To work with the School Operations Manager to review and monitor the catering budget and trading account.
- Ensure that payroll is processed in a timely manner and reconciled to the school budget forecast and variances.
- To ensure that the inventory is maintained and checked in accordance with school requirements.
- To analyse, and monitor examination fees reporting to the Headteacher and Governors.
- To ensure that the school holds appropriate insurance cover and other licences as may be required.
- To be responsible for charity/trust accounts.
- To ensure the use of ICFP (Integrated Curriculum Financial Planning) benchmarking to assess trends and to advise the Headteacher and governors.
- Be accountable for ensuring all financial returns to the relevant bodies are submitted within statutory deadlines.
- Ensure compliance with all aspects of the Academies Handbook related to financial management.
- Line manage the School Finance officer.
- To identify and pursue ways of developing the business activity of the school
- Pursue sources of funding, sponsorship and grants to support school activities.
- Seek out funding opportunities from external partners and the Local Authority to enhance the school physical environment. Write and prepare bids to secure funding.
- To lead and manage school Condition Improvement Fund bids alongside our CIF Partner.

Audit and internal scrutiny

- Prepare and submit annual accounts in line with the requirements of the Academies Handbook.
- Ensure all financial returns to the relevant bodies are submitted within statutory deadlines.
- To be responsible for the year end audit and liaison with external auditors in preparation for year end accounts.
- Alongside the Headteacher develop the Trust's programme of internal scrutiny.
- Ensure that risks are being appropriately addressed through internal scrutiny.
- Maintain the Trust's risk register
- Provide information to the Trust's Audit Committee and partipate in discussions.
- To undertake peer reviews with other schools to provide internal scrutiny oversight.

Compliance

- Manage the school's compliance with statutory obligations, and advise others on the relevant legal, regulatory and ethical requirements.
- Track all relevant school financial policies and ensure they are updated in accordance with the policy review schedule.

Extended Services

- To be responsible for ensuring school lettings contribute financially and benefit the school.
- To have an oversight of school bookings/lettings, to ensure maximum effective use of buildings and facilities.
- To be proactive in exploring and making recommendations for the implementation of the new extended services legislation.
- To prepare a business plan, reviewing it regularly to facilitate changes.
- To attend appropriate courses and meetings appertaining to extended services legislation.

Special factors

- The nature of the work may involve the jobholder carrying out work outside of normal working hours.
- To participate in Staff Training Days and other training opportunities as required.
- To comply with all financial, safety, data protection, IT software licensing, child protection and equal opportunity requirements and any other relevant guidelines.

School ethos

- To play a full part in the life of the school community, to support and uphold the school's values and to encourage staff and students to follow this example.
- To comply with the school's health and safety policy and undertake risk assessments as appropriate.
- To promote actively the school's policies and procedures
- To engage in continuing professional development as agreed.
- To undertake any other reasonable duties as directed by the Headteacher.

***Note**: This job description is not exhaustive and may be amended to reflect the changing needs of the school, in consultation with the postholder*

The school will endeavour to make any necessary reasonable adjustments to the job and the working environment to enable access to employment opportunities for disabled job applicants or continued employment for any employee who develops a disabling condition.

SIGNATURES:
Whilst every effort has been made to explain the main duties and responsibilities of the post, each individual task undertaken may not be identified in this job description. This job description sets out the duties and responsibilities of the job at the time when it was drawn up. Such duties and responsibilities may vary from time to time without changing the general character of the duties or the level of responsibility entailed. Such variations are a common occurrence and cannot in themselves justify a reconsideration of the grading of the job.

LUTTERWORTH HIGH SCHOOL | AN 11~ 16 ACADEMY TRUST

Signed: _____
(Employee)

Signed: _____
(Headteacher)

Dated: _____
(Employee)

Dated: _____
(Headteacher)

Lutterworth High School Academy Trust is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment. Any offer of appointment will be conditional upon an enhanced DBS, satisfactory references and medical clearance.

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Person Specification
Chief Financial Officer

Education and Qualifications

Essential	Desirable
• GCSE or O level equivalent, grade C/4 or above, in English and Mathematics • Evidence of continuing professional development relevant to finance, business management or leadership.	• Educated to degree level or equivalent in a business related discipline • School Business Qualifications e.g. CIPFA or willingness to undertake an appropraite qualification • Accountancy qualification from a professional body such as ICAEW, ACCA, CIMA

Experience

Essential	Desirable
• Significant leadership and management experience in an education setting • Extensive experience of Education MIS Systems SIM's, Finance and other modules including payroll • Extensive experience of personnel levels of subject expertise and enthusiasm • Extensive experience of personnel procedures and conditions of service • Proven experience of successful project management	• Previous experience as a School Business Manager

Knowledge and skills

Essential	Desirable
• Knowledge of LA policies, systems and procedures relevant to the job • Effective interpersonal and teamwork skills • Excellent communication skills • Excellent planning and organisational skills • IT literate with a strong working knowledge of MS word, Excel, SIMs	• Up to date knowledge and experience of using financial IT packages e.g. Sage, PS financials • Up to date knowledge of relevant safeguarding practices and commitment to the protection and safeguarding of children

Other Requirements / Personal Attributes

Essential	Desirable
• An understanding of, and commitment to equal opportunities, and the ability to apply this to all situations • Must be able to perform all duties and tasks with reasonable adjustment, where appropriate, in accordance with the provisions of the Equality Act 2010 • Collaborative, professional style of working. Ability to work under pressure and remain positive, enthusiastic and resilient • Deep commitment to LHS' ethos "Where Learning Comes First"	

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Get Directions

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