



Finance & Operations Director (part time)

Dales Academies Trust, North Yorkshire

Candidate Information Pack

Closing date: 18th March 2019 5pm

Interviews to take place on 25th March 2019

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Dales Academies Trust | Blair Avenue | Ingleby Barwick | Stockton-on-Tees | TS17 5BL

Dales Academies Trust is an exempt charity regulated by the Secretary of State for Education. It is a company limited by guarantee registered in England and Wales, company number 08372064, whose registered office is at All Saints Academy, Blair Avenue, Ingleby Barwick, Stockton On Tees, TS17 5BL.

**Welcome To
Dales Academies Trust, North Yorkshire**

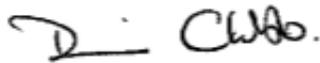
Dear candidate

Thank you for taking your time to download our application pack and expressing your interest in the position of Finance & Operations Director for the Dales Academies Trust (Dales).

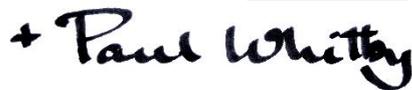
This pack has been developed to provide you a summary of all the information you need to consider when applying for a job within Dales.

Within the pack you will find a job description, a person spec, a brief summary on the Trust and details of how to apply for this post should you choose to make an application.

We wish you every success with your application and we look forward to meeting you in the near future.



Damian Chubb
Dales CEO



Bishop of Whitby
Chair of the Dales Trust Board

Finance & Operations Director

Introduction

We are pleased to offer an exciting opportunity to join and contribute at a strategic level, to our growing Multi Academy Trust, which operates within the Anglican Dioceses of both Leeds and York and currently comprises one Secondary School and 10 Primary Schools. The successful candidate will become an integral part of the team, contributing to the continued development and shaping of the Trust.

The post holder of this new role will provide high quality financial management to ensure compliance with procedures and statutory requirements, whilst providing strategic and operational leadership in all aspects of business activities within the central Trust team.

We will shortly be confirming the precise location for this post but it will be in the Ingleby Barwick / Thornaby area, however, the role also requires the ability to travel to, and work with, Trust academies across the Diocese of Leeds and the parts of the Diocese of York within which Dales operates.

Job Title	Dales Academies Trust (Dales) Finance & Operations Director
Reporting to	Chief Executive Officer of Dales
Accountable to	The Finance & Resources committee of Dales
Duration of Post	Permanent
Work Commitment	4 day / 30 hours per week, with the possibility this could increase to 5 days in the future
Salary Range	Competitive, commensurate with qualifications and experience
Work Pattern:	To meet the needs of the Trust, which may require occasional evening work
Start date:	As soon as possible or as available with notice

For further information about the Trust please visit <https://www.dalesmat.org>

If you would like an informal discussion about the post, please contact Damian Chubb, CEO on 07876684655.

All applicants must apply using the Trust application form, which is available with more details from our website. Please note we do not accept CVs. If you would like to apply for this position, please complete the application form and submit it to Bethany Holmes at bethany.holmes@bdat-academies.org (Bradford Diocese Academies Trust are supporting the Trust in this recruitment and selection process)

DBS clearance will be required for the successful applicant

Closing date for applications: **18th March 2019 5pm**

Interviews / Assessments will be held on 25th March 2019

Background

Dales Academies Trust is a relatively new MAT, with sponsor status, for the northern church schools of the Dioceses of Leeds and York; it was incorporated in September 2017.

As with the other church MATs across both dioceses, the Trust is open to church and non-church schools with a core purpose of providing an inclusive education for children of any ability, culture, gender, sexuality, faith or no faith. The ethos will be derived from and informed by the Church of England's commitment to education and schooling over more than 200 years.

Dales was created in a short time frame, driven by a necessity to provide a sponsor solution for a Church of England primary school in category. However, the Diocese of Leeds has been transparent with the Department of Education (DfE) and the Regional Schools Commissioner (RSC) about its intentions to establish additional Trusts across the Diocese. It has openly stated that a MAT for northern church schools (Richmond and Stockton) would be the focus for the new Trust. The opportunity to develop a Trust for schools in both the Dioceses of Leeds and York is a strong offer and creates a dynamic partnership.

To enable the quick set up of the new MAT, the Diocese of Leeds commissioned BDAT to set up the new MAT for North Yorkshire and appointed the BDAT Chief Executive Officer (CEO) interim CEO of the new Trust. A dedicated CEO for Dales was appointed in September 2017 and a Finance Officer shortly afterwards; BDAT continues to support the developing Trust.

To date Dales consists of the following schools:

- Ainderby Steeple Church of England Primary School
- All Saints Church of England Academy (Secondary)
- Barton Church of England Primary School
- Croft Church of England Primary School
- East Cowton Church of England Primary School
- Kirkby Fleetham Church of England Primary School
- Ravensworth Church of England Primary School
- South Otterington Church of England Primary School
- Trinity Academy Eppleby Forcett
- Trinity Academy Middleton Tyas
- Trinity Academy Richmond

It is expected that a further two, possibly three, Primary Schools will join the Trust within the calendar year.

Job Description and Person Specification

POST:	Finance & Operations Director
GRADE:	Competitive salary commensurate with qualifications and experience
RESPONSIBLE TO:	Chief Executive Officer
STAFF MANAGED:	Finance Officer / Finance Assistants
POST REF:	
JOB PURPOSE:	To lead and manage all matters relating to operations and finance for the Trust, ensuring appropriate financial compliance, policy, systems and reporting arrangements are in place. As a member of the Strategic Leadership Team the postholder will work closely with the Chief Executive Officer, Trust Board, Local Governing Bodies and Headteachers and will act as the Chief Financial Officer.
JOB CONTEXT:	<p>The postholder will form part of the central trust team, taking a lead role for Trust wide activities, by developing and implementing policies, procedures and systems to ensure the Trust complies with all relevant legislation.</p> <p>The postholder will also work closely with a wide range of external partners in order to fulfil their duties.</p> <p>The post requires DBS clearance.</p>
ACCOUNTABILITIES / MAIN RESPONSIBILITIES	
Operational Management or Operational Issues	<ul style="list-style-type: none"> • Provide oversight and strategic direction for all financial and operational matters, including estates management, across the Trust, including advising Local Governing Bodies, Headteachers and Business Managers in each academy. • Preparing the Trust's annual financial forecasts in conjunction with the CEO and other stakeholders. • Ensure sound financial management is in place across the Trust in accordance with the Academies Financial Handbook, the Trust's Finance Policy, Charities SORP and other relevant financial regulations. • To be responsible for the preparation of the annual budget returns and delivery of short, medium and long term financial plans for the Trust to the ESFA and other statutory bodies. • Monitoring the Trust's financial position and providing timely information to enable efficient budgetary management and decision making. • Forecasting cash flow on a rolling 12 month basis. • Leading and managing staff within the Central finance function to ensure the team works effectively. • Produce the required year-end financial statement in preparation for external audit, liaising with external parties to ensure the appropriate filing of the annual company accounts.

ACCOUNTABILITIES / MAIN RESPONSIBILITIES (cont)	
Operational Management or Operational Issues	<ul style="list-style-type: none"> • Work closely with the CEO to develop Trust strategy, including estates management, ensuring that plans are financially robust, including appropriate financial modelling and options appraisal. • Contribute to the development of the Trust's strategic business plan ensuring objectives are linked to the overall financial plan. • To lead on the development and reviewing of statutory policies. • To lead on all areas of contract management, including the tendering process, in collaboration with Headteachers, undertaking reviews and evaluation as required. • Monitor payroll and ensuring compliance with policy. • Manage projects including preparing bids and produce reports. • To act as the Trust Data Protection Officer.
Skills	<ul style="list-style-type: none"> • Communicate effectively and provide comprehensive advice and guidance on all financial and operational concerns. • Ability to liaise proficiently with internal and external agencies. • Motivate, train and support staff within the central team and also across the Trust, to ensure financial compliance.
Safeguarding	<ul style="list-style-type: none"> • To be committed to safeguarding and promote the welfare of children, young people and adults, raising concerns as appropriate.
Systems and Information	<ul style="list-style-type: none"> • Develop and implement policies, procedures and systems to ensure the accurate reporting of financial information.
Data Protection	<ul style="list-style-type: none"> • To comply with the relevant legislation and confidentiality.
Health and Safety	<ul style="list-style-type: none"> • To work with colleagues and others to maintain health, safety and welfare within the working environment.
Flexibility	<ul style="list-style-type: none"> • Whilst this job outline provides a summary of the post, this may need to be adapted or adjusted to meet changing circumstances. Such changes would be commensurate with the grading of the post. All staff are required to comply with the Trust's Policies and Procedures.
Date of Issue:	March 2019

PERSON SPECIFICATION

JOB TITLE: Finance & Operations Director

Essential upon appointment	Desirable on appointment (if not attained, development may be provided for successful candidate)
<p>Knowledge</p> <ul style="list-style-type: none"> • Detailed knowledge of Academy financial requirements and financial regulations. • Comprehensive knowledge of budgetary management. 	<ul style="list-style-type: none"> • Commercial awareness
<p>Experience</p> <ul style="list-style-type: none"> • Extensive experience of successful financial management of a complex budget. • Experience of managing a wide range of financial tasks including budgeting and forecasting. • Proven experience of the management of resources in a changing organisational environment, including human and financial resources. • Experience of operating at senior management level. • Significant experience of contributing at a strategic level to business improvement. • Experience of using financial information systems • Extensive experience of providing sound financial advice and guidance to Senior Leaders. • Experience of managing staff effectively. 	<ul style="list-style-type: none"> • Experiencing of working within a School or Academy. • Experience of preparing bids to generate income.
<p>Organisational / Personal Skills</p> <ul style="list-style-type: none"> • Highly developed negotiating and influencing skills. • Strong interpersonal skills and the ability to communicate effectively both verbally and in writing, along with excellent presentation skills. • A strong teambuilding approach. • Excellent analytical skills and the ability to provide clear and sound advice. • Good interpersonal skills that build and maintain effective relationships. • Ability to inspire and empower others. • Exceptional organisational skills. • A high level of IT ability, including Microsoft Office/Excel and experience of working with one or more financial accounting packages • Ability to manage effectively in an environment of conflicting and changing priorities. • Ability to lead and manage change within a large organisation. • Ability to operate in an approachable manner. 	

Essential upon appointment	Desirable on appointment (if not attained, development may be provided for successful candidate)
Qualifications <ul style="list-style-type: none"> • Finance degree, CCAB or equivalent qualification 	
Other Requirements <ul style="list-style-type: none"> • Ability to travel between academies within the Trust and other locations outside of area as required, in order to fulfil the role. • Attendance at meetings outside of normal business hours and during the evening, will be required. 	