

**THE HOWARD**  
Academy Trust

# Candidate Briefing Pack

## Deputy Chief Finance Officer





# Welcome to The Howard Academy Trust

Thank you for showing an interest in working for The Howard Academy Trust. From September, our Trust will be comprised of 8 schools across Kent, Medway and Bexley, with 4 secondary schools and 4 primary schools. As a Trust, we have future growth plans and expect further schools to join us over the 2024/25 academic year.

Our overarching aim and vision for our member schools is “working together to create a community of successful learners”. In doing this, we will deliver an outstanding education for the children and young people who attend our academies. We endeavour to ensure that all our pupils have access to the highest standards of teaching, resources and opportunities. The Trust’s role is to oversee the leadership and vision of member schools and to develop effective and supportive partnerships between them. We have a firm belief within the Trust that every child should have access to at least a good education.

We are proud that every academy inspected since joining our Trust has remained as a Good school. Both Temple Mill Primary School and Waterfront UTC joined the Trust as sponsored academies and have moved from Special Measures to a Good school on their first inspection. Our schools serve their own community, and each has a unique identity. Being part of this Multi Academy Trust has already provided member schools with practical benefits. We want communities to be proud of their local THAT school and we are determined to make it the first choice for all families.

As Chief Executive, I am enormously proud of our schools and of the leaders, governors, teachers and support staff who every day ensure our pupils enjoy and make good progress in their learning.

**Owen McColgan**  
*Chief Executive*  
The Howard Academy Trust



# About This Role

Thank you for your interest in the role of Deputy Chief Finance Officer at The Howard Academy Trust. We are seeking to appoint an experienced finance leader ready for the next stage of their career who can add capacity to our central finance team as we continue to grow. We want to hear from experienced finance professionals, with leadership qualities and a drive for continuous improvement to ensure our excellent finance function continues to evolve, ensuring high standards continue to be achieved.

The successful candidate will join a successful growing team with a strong financial track record. Since 2019, The Howard Academy Trust's financial position has been transformed and is now incredibly strong, moving the Trust from a circa £1m deficit to holding appropriate reserves of £1.8m through sound financial management. The Year ended 2022/23 management letter identified zero new recommendations, which is something we are immensely proud of. The successful candidate will be committed to continuing this excellent record, providing the best support, advice and provision to our schools.

The successful candidate will be a great leader, have strong financial acumen and will be driven to help us achieve our Trust strategic objectives.

From September 2024, we will be comprised of 4 Primary and 4 Secondary academies, educating approximately 5500 pupils in Medway, Kent and Bexley. As a Trust, we are expecting further growth in the 2024/25 academic year, expecting to grow to around 15 academies within the next 3 years.

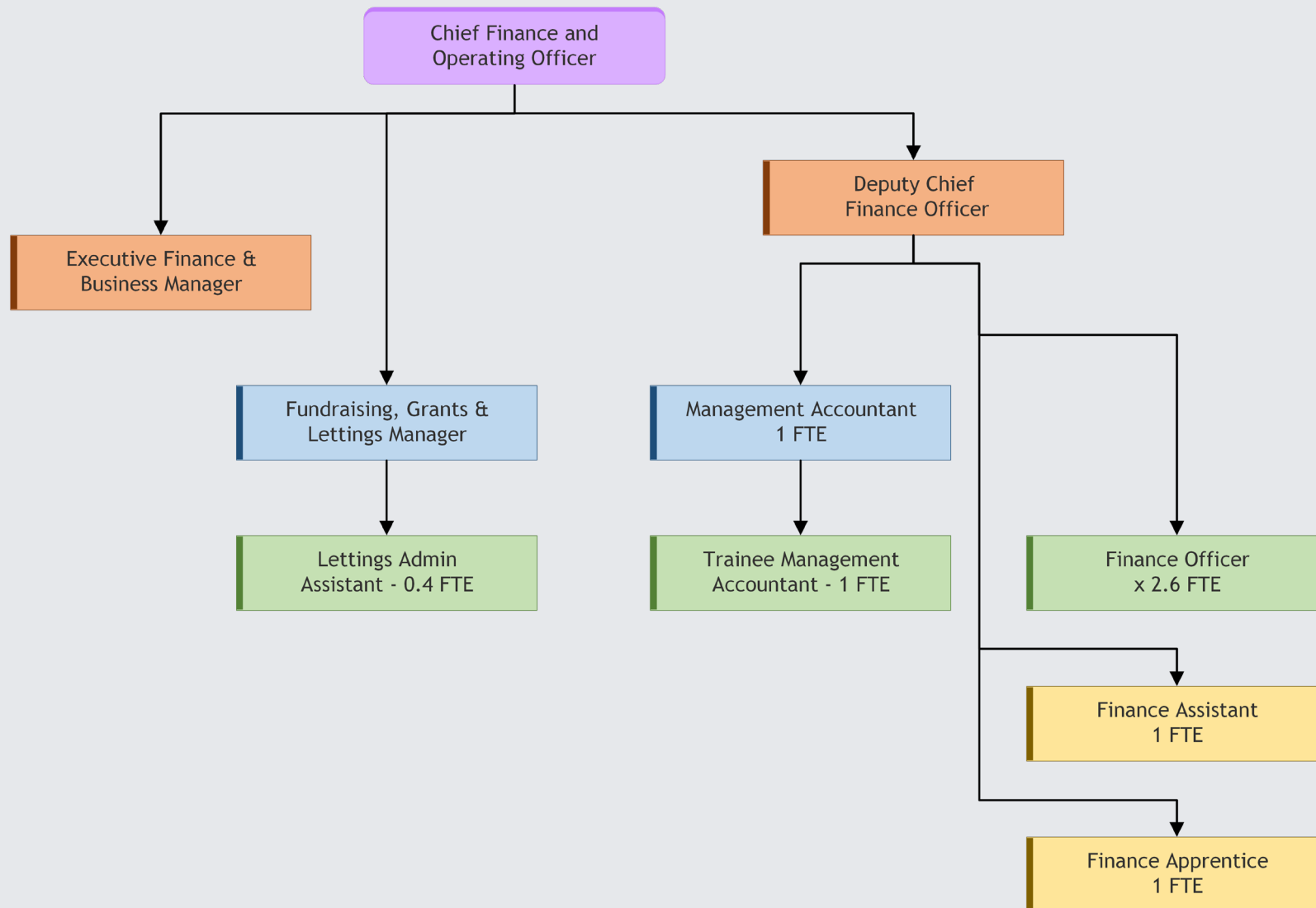
This is an excellent opportunity for an established Finance professional to advance their career. This role offers hybrid working, an excellent remuneration package, LGPS pension and a wider range of benefits as detailed below. Our central team are based at Waterfront UTC in Chatham.

I welcome conversations from any prospective candidates about the role. To arrange a call, please email [nwoodley@thatrust.org.uk](mailto:nwoodley@thatrust.org.uk).



**Kyle Taylor**  
*Director of Finance & Operations*  
The Howard Academy Trust

# Finance Team Structure





## *Working together to build a community of successful learners*

### Vision and Values

Learning and growth are at the heart of The Howard Academy Trust ethos. We strongly advocate that all members of our community have the opportunity to become the very best that they can be. We recognise and value the unique talents and expertise within our community and aim to create a culture of dignity, inclusivity, respect and ambition, where all can thrive.

This is achieved through:

**Excellent teaching and learning that promotes inclusivity;**

Regular opportunities for collaborative CPD to ensure best practice across academies;

**A proactive network for joint working across academies, for staff at various career stages;**

The highest standards of behaviour and conduct achieved through clear expectations and positive relationships;

**The unique character of each academy is valued and contributes to the THAT whole Trust ethos;**

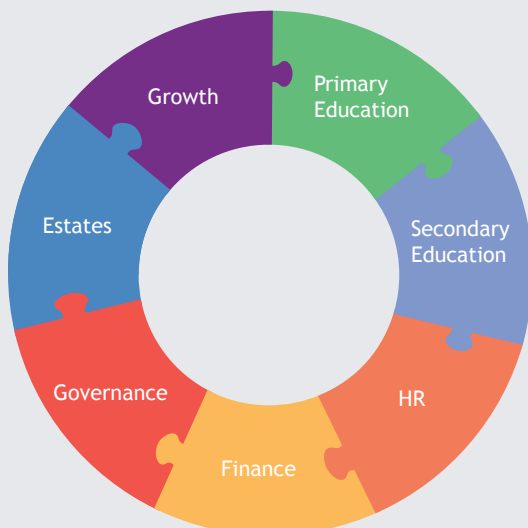
Shared whole Trust values of dignity, respect and ambition;

**High aspirations for all involved with the Trust and a solutions led approach;**

Each academy is a hub for its local community and families;

**Facing outwards and working in collaboration with other organisations and stakeholders;**

A centralised team that allows academies leaders to focus on their core purpose of education.



### Strategic Priorities

Continuously improving the quality of provision of all our academies and enhance pupil outcomes across the Trust.

Provide excellent teaching and learning that promotes inclusivity.

Continue to build the profile of THAT to support further growth within the Southeast.

Champion our THAT People Strategy to retain, recruit, develop and reward an excellent workforce.

Ensuring a financially viable and sustainable MAT with a strong business infrastructure.

Ensuring effective leadership and governance at all levels.





# Our Family of Schools



**The Howard School**  
1,500 Pupils on Roll  
Rated Good by Ofsted  
Located in Rainham, Kent



**Temple Mill Primary School**  
240 Pupils on Roll  
Rated Good by Ofsted  
Located in Strood, Kent



**Deanwood Primary School**  
230 Pupils on Roll  
Rated Good by Ofsted  
Located in Rainham, Kent



**Thames View Primary School**  
460 Pupils on Roll  
Rated Good by Ofsted  
Located in Rainham, Kent



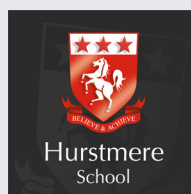
**Miers Court Primary School**  
420 Pupils on Roll  
Rated Good by Ofsted  
Located in Rainham, Kent



**Waterfront UTC**  
400 Pupils on Roll  
Rated Good by Ofsted  
Located in Gillingham, Kent



**The Abbey School**  
1,200 Pupils on Roll  
Located in Faversham, Kent



**Hurstmere School**  
1,100 Pupils on Roll  
Located in Sidcup, London

# Working for The Howard Academy Trust

We are pleased to offer an excellent benefits package that rewards the successful candidates and looks after them as a caring employer. We are delighted to have obtained the Platinum Kent and Medway Workplace Wellbeing Award, which recognises our values as an employer and the offering we give.



## Hybrid Working

- 2 days per week from home (flexibility required as per the needs of the role)

## Financial

- A highly competitive salary commensurate of the role and responsibilities
- Subsidised private healthcare with Benenden Healthcare
- Generous LGPS Pension (22.5% contributions)- relevant continuous service recognised
- Access Earlypay allowing employees to draw down a proportion of their salary in advance for emergencies
- Salary sacrifice electric vehicle scheme

## Professional Development

- Funding available for part qualified candidates to complete their qualification
- Investment in our staff and continuous professional development support for all roles
- Career progression and upskilling opportunities
- In house mentoring and coaching opportunities
- Trust wide CPD packages

## Wellbeing

- Generous annual leave package of 32 days plus bank holidays
- Platinum Mental Health and Wellbeing Award
- Employee Assistance Programme, 24/7 access to a free counselling service for our employees and their families, for confidential advice and guidance
- Access to Senior Mental Health First Aiders and a team of established Mental Health First Aiders based at all of our academies
- Hosts of Medway Council's wellbeing afternoons, consisting of use of a health check machine, blood pressure checks, alcohol awareness speakers
- Free flu jabs each autumn for all staff, at their own academy for ease of access.
- Discounted gym membership packages across a range of Gyms
- Cycle to Work Scheme

## Facilities

- Discounted hire of the school facilities, halls, fields, and gyms, for all staff up to 20%
- On site catering at our school canteens with a full lunch menu
- Free car parking at each Trust site

# Job Description

<b>Job Title:</b>	Deputy Chief Financial Officer (DCFO)
<b>Location:</b>	Trust Central Team
<b>Department:</b>	Finance (Member of Operations Management Team)
<b>Remuneration:</b>	£60k- £73k
<b>Reporting to:</b>	Chief Financial and Operations Officer (CFOO)

**Hybrid Working Role - 2 days per week from home** (*flexibility required as per business needs*)

## Core Purpose and Scope

The post holder will be an experienced finance professional and will undertake responsibilities as a key member of the Operations Management Team. The post holder will support the CFOO in the delivery of the strategic and operational finance services to all academies, ensuring we deliver an excellent service to our schools, ensuring we remain a financially sound Trust, offering an excellent service to our schools.

## THAT Vision & Values

As a Trust, our Vision and Values are achieved through:

- Excellent teaching and learning that promotes inclusivity;
- Regular opportunities for collaborative CPD to ensure best practice across academies;
- A proactive network for joint working across academies, for staff at various career stages;
- The highest standards of behaviour and conduct achieved through clear expectations and positive relationships;
- The unique character of each academy is valued and contributes to the THAT whole Trust ethos;
- Shared whole trust values of dignity, respect and ambition.
- High aspirations for all involved with the Trust;
- Each academy is a hub for its local community and families;
- Facing outwards and working in collaboration with other organisations and stakeholders;
- A centralised team that allows academies leaders to focus on their core purpose of education.

## Values and Behaviour

All members of staff must act with honesty and integrity; have strong knowledge within their field, keep their knowledge and skills up-to-date and are self-critical; forge positive professional relationships; and work with parents in the best interests of the students in the school.

## Personal and Professional Conduct

The post holder should conduct themselves professionally at all times, treating pupils and staff with mutual respect, regardless of personal beliefs, in accordance with Trust policies and practices.



## Key Responsibilities

- Support the CFOO with the execution of their duties and deputise on occasion
- Lead on the production of the three year budgets for the schools and Trust
- Ensure financial regulatory compliance and controls, as specified in Trust policies, the Academy handbook, Company law and the charities commission is adhered to at all times by all employees in the Trust.
- Finance Leadership support on accounting matters/ costing matters to the wider finance team and staff across the Trust
- Be responsible for the monthly management account process, ensuring funds in each academy are spent appropriately, and that timely, accurate forecasts are produced
- Deputise for the CFOO as required
- Be the system owner for finance systems, ensuring appropriate internal controls, accurate accounting and budgeting and full utilisation of functionality
- Be a visionary, reliable, efficient leader supporting our school leaders, ensuring our Principals can make decisions based on timely sound financial data.
- Ensure value for money across the Trust, maximising every £ of public money
- Directly support a small number of academies, fulfilling the Executive Finance Business Manager (EFBM) as needed depending on risk ratings of schools and need

## Financial Management/ Controls

- Ensure prompt and accurate reconciliations are completed by the finance team each month including payroll, bank and balance sheet
- Ensure the effective development, implementation and full utilisation of financial software, procedures and processes across the Trust.
- Maintain, accurately the Fixed Asset register, ensuring compliance with the capitalisation and depreciation policy
- Ensure adequate financial internal controls are in place and upheld
- Be responsible for the preparation and monitoring of the 24-month rolling cashflow forecast and delivery of our investments policy
- Organise and lead the Year End Audit process, ensuring that the auditors are provided with completed schedules, that are accurate, maintaining our Trusts strong audit performance
- Lead internal audits, liaising with our external Internal Scrutiny partner to ensure that auditors are provided with completed schedules, that are accurate

## Management Accounts/ Budgets

- Be responsible for the monthly management accounts, ensuring they are prepared in a timely manner each month, ensuring accuracy to allow Trust leaders to make informed decisions. Additionally ensuring compliance with financial policies, procedures and The Academy Trust Handbook
- Regularly meet with the CFO and Executive Finance Business Manager(s) to review the management accounts and discuss other finance matters
- Work with the Head of Estates, Head of IT and other members of the middle and senior leadership team to financially manage projects included in 5-year plans
- Effectively utilise budget software and integrated curriculum financial planning to ensure robust budget setting, contributing to and leading aspects of the budget setting process
- Coordinate and undertake key strategic finance projects when required, including modelling of costings, analysing costings, implementing new finance procedures etc

## General

- Identify additional funding sources and support in the preparation of bids for grants and additional income, including financial reporting for those the Trust is successful in obtaining and contributing to the preparation of business cases for Trust schools as appropriate.
- Lead on the preparation of statutory returns, working with the CFOO to ensure accurate and timely reporting
- Be responsible for the effective delivery of all exchequer services, including creditors, debtors, processing of invoices and orders, payment runs etc
- Lead on the resolution of complex financial queries and questions that the finance team are not able to deal with
- Prepare and submit the monthly VAT return, ensuring its data is accurate and correct.
- Ensure sufficient training and development opportunities are afforded to people who are line managed by the post and the wider Trust community where appropriate, e.g., budget managers.

## Fund Accounting

- Be responsible for ensuring funds are posted correctly in the accounts system, ensuring the finance team are fully aware of how to fund account correctly.
- Ensure correct accounting within the finance system, in line with accounting conventions and legislation

## Resources

- Operate relevant equipment/ICT packages (e.g. MS Office- including Excel, internet, intranet, Arbor, E-mail)

## Management

- This post has leadership and management responsibility for the finance team, including the management accounts team, finance officers and other finance staff
- The post holder is expected to be a leader, not just a manager

## Additional Duties:

- All staff, with the support, of the academy's designated DSL, have a responsibility for providing and safeguarding the welfare of the children and young people.
- To be familiar with and support any health and safety procedures and ensure all duties and responsibilities are discharged in accordance with the academy's health and safety at work policy.

This job description does not form part of the Contract of Employment and is not necessarily a comprehensive description of the duties required but outlines the main responsibilities of the post. It will be reviewed regularly and may be subject to modification or amendment at any time after consultation with the holder of the post. The duties may be varied to meet the changing demands of the Academy at the reasonable discretion of the line manager.

An enhanced DBS check will be required for this post. The job description is current at the date shown, but, in consultation with you, may be changed to reflect or anticipate changes in the job commensurate with the grade and job title. The successful candidate must have a commitment to safeguarding and promoting the welfare of children and young people.

# Person Specification

Please refer to these requirements when completing the application. The person specification is related to the requirements of the post as determined by the job description.

Essential	Desirable
<b>Qualifications and Training</b>	
<ul style="list-style-type: none"> <li>• CCAB / Part CCAB qualified (if part qualified must be committed to completing qualification)</li> <li>• AAT Level 4 or equivalent</li> <li>• Good general education</li> <li>• Excellent ICT skills</li> <li>• Evidencable continual CPD</li> </ul>	
<b>Experience</b>	
<ul style="list-style-type: none"> <li>• At least 7 years proven experience working in finance roles, with a minimum of 3 years at middle or senior level.</li> <li>• Line management experience including: appraisals, staff development, coaching and training</li> <li>• Experience of financial management and finance systems</li> <li>• Experience of reporting financial information to non-finance personnel</li> <li>• Experience of leading audits</li> <li>• Experience of interacting successfully with senior leaders/ employees</li> <li>• Preparation/ review of management and or financial accounts</li> </ul>	<ul style="list-style-type: none"> <li>• Experience of working in the Academy or Schools Sector</li> <li>• Experience of PS Financials</li> <li>• Experience of IMP Budgeting</li> </ul>
<b>Knowledge and Skills</b>	
<ul style="list-style-type: none"> <li>• Excellent working knowledge of Microsoft Excel</li> <li>• Sound knowledge and understanding of Finance Systems</li> <li>• Excellent ICT skills</li> <li>• Able to work with a high degree of accuracy, with attention to detail.</li> <li>• Full UK driving licence and own vehicle</li> <li>• Up to date knowledge of financial standards and legislation</li> </ul>	<ul style="list-style-type: none"> <li>• Knowledge of child protection and safeguarding policies</li> <li>• Knowledge of the Academy Trust Handbook</li> </ul>

## Personal Qualities

- Excellent communication skills including written and oral.
- Driven, proactive and able to work well under pressure.
- Excellent organisational skills
- Rigorous and methodical
- Ability to work on own initiative and be a natural problem solver
- Able to lead and inspire others, a high energy leader who is a strong team player
- Strong multi tasker with the proven ability to prioritise and manage a busy workload
- Keen to grow, learn and be an ambassador of continuous improvement.
- Positive approach to work and challenges
- Confident and able to provide training, advise and support to colleagues of all levels