

# Marlow Education Trust

Chief Financial Officer



# Marlow Education Trust

## Welcome to the Marlow Education Trust

The Marlow Education Trust (MET) is a Multi-Academy Trust committed to excellence in education and to ensure the highest possible quality of education for all children in our community.

The Marlow Education Trust was founded to support education in schools in the local community in and around Marlow, Buckinghamshire.

The Marlow Education Trust currently comprises two schools: Sir William Borlase's Grammar School and Beechview Academy. In line with our vision, we are currently in advanced talks with another local secondary, with the capacity to grow the Trust and the CFO will pay a central role in this process. There are realistic expectations of being an 8 school MAT within 3 years.

Sir William Borlase's Grammar School, where the role will be based, is a co-educational grammar school in the centre of Marlow, Buckinghamshire. Founded in 1624 on the same site we occupy today, the brick and flint Cloisters, clock tower and Chapel of Borlase share a street with Mary Shelley's cottage where she wrote Frankenstein, TS Eliot's house and the original site of the Royal Military College now at Sandhurst.

Beechview Academy is a Junior School serving the Marsh and Micklefield areas of east High Wycombe.

## Our vision

The vision of the Marlow Education Trust is to develop a group of schools in Marlow and the surrounding area which work together to deliver the best outcomes for each pupil, whatever their ability, background or needs.

The Trust will seek to develop a culture of high aspiration, support, and challenge for all individuals, both staff and pupils.

The target is for every school to be outstanding and autonomous, each serving their communities and working and sharing with others.

The focus is that each pupil should achieve their individual aspirational goals – academically, vocationally, in sport, the arts and in extra-curricular activities and that each pupil should grow in confidence and self-esteem.

## Our values

The core values of the Trust are:

- quality relationships based on trust and respect
- commitment to the individual
- commitment by all to being the best that they can be
- commitment to being open and willing to share with others and to learn from them

Further details of our vision and values, along with additional information about our existing schools and our current central team, can be found on our website [www.marlowet.org](http://www.marlowet.org)





# Working for the Marlow Education Trust

## A professional community

In joining the staff of the Marlow Education Trust, you would become part of a professional community dedicated to improvement. We invest heavily in staff professional development for teaching and non-teaching staff, but we believe that in a high-performing culture such as ours, the most effective professional growth comes through learning from others in the community and becoming more adept at self-regulated improvement.



## A commitment to wellbeing

We are committed to providing an outstanding, supportive work environment for all our staff.

The MET staff, along with those of its member schools operates as a friendly, sociable team and there are regular trips to theatre productions and sporting events. There is a well-provisioned staff common room and access to a superbly equipped onsite gym.



## Staff benefits

The children of members of staff are given priority in the Sir William Borlase's Grammar School admissions process in the event of oversubscription. Please see the school's admissions policy for more details.

There are extensive opportunities to accompany school trips to exciting destinations in the UK and beyond as well as participating in a wide range of school based activities.



# The Role

## Marlow Education Trust Chief Financial Officer

<i>Working pattern</i>	<i>Full Time, 37 hours per week, full year working</i>
<i>Salary</i>	<i>Bucks Pay range 10/11 (£54,918 - £69,464 per annum depending on experience)</i>
<i>Required</i>	<i>As soon as possible</i>

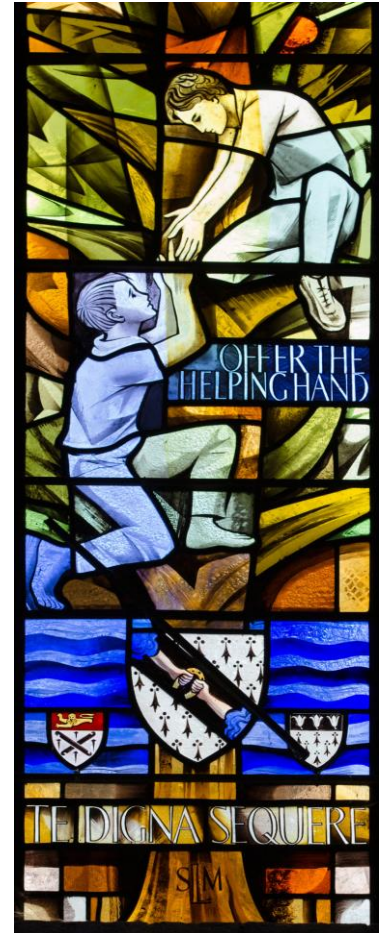
### Context

The Marlow Education Trust (MET) recently restructured its Finance and Operations team. Determined to recruit the right people to join our growing organisation, we have developed a structure designed to meet our existing financial and operational needs, along with the capacity to embrace new member schools. This role is for a Chief Financial Officer who would not only have responsibility for financial control and management accounting as the Trust's lead accountant, but who would also look at developing the commercially-focused, business-oriented aspects of the Trust now and as it grows. The role would work alongside an Operations and Compliance Manager who would be responsible for day-to-day service and estate provision in our schools. Other related roles are planned as part of our expansion.

### The Purpose of the Job

The CFO will be the Trust's lead accountant with overall responsibility for ensuring financial control and compliance through the production of management and financial accounts, as well as leading the Trust's financial strategy. They will also be responsible for developing the Trust's commercial activity, actively seeking means of increasing revenue. They will work with the Operations and Compliance Manager to lead on condition improvement applications and support the delivery of major works projects. They will also advise Trustees and Members in exercising their financial responsibilities.

The CFO will report to the Trust CEO.



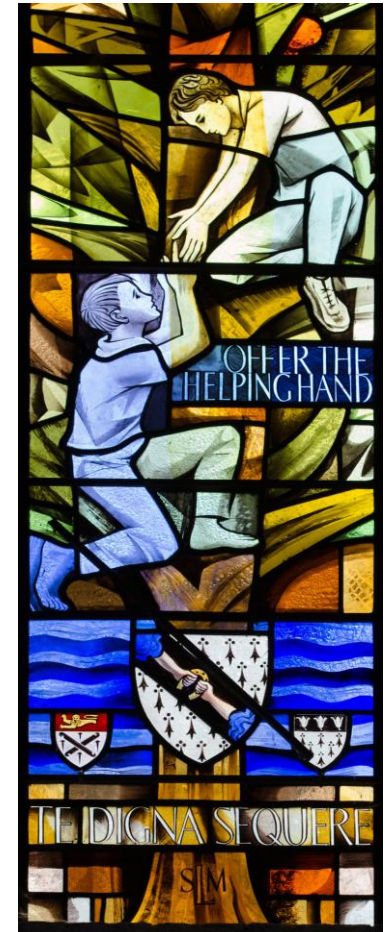
## Chief Financial Officer – Key Responsibilities

### Financial Leadership and Strategy

- Provide strategic oversight of the finance function, ensuring high-quality, effective, and proactive service provision.
- To prepare an annual plan as to the salient actions and developments to be addressed.
- Ensure compliance with financial standards and regulations, including legislation, the Trust's Funding Agreement, the ESFA, the Academy Trust Handbook, the Charity Commission, Sport England, and HMRC for all the Trust and related party entities.
- Lead the development and execution of the Trust's financial strategy, including budget planning, monitoring, and reporting.
- Lead on all due diligence work to support MAT expansion plans
- Lead on Management Accounts preparation and Financial Accounts preparation.
- Take the lead and stay up to date on all developments in schools and academy financing, working with and advising the Headteachers, CEO and the Finance Trustees.
- Ensure the schools access the maximum from funding streams available to them monitoring DFE and ESFA guidelines and updates.
- Provide financial leadership and professional financial management for the schools in the Trust, including that of its extended facilities ensuring compliance with the Academies Financial Handbook.

## The Role

- Lead on all matters relating to the academy finances, including supporting the Director of HR with payroll and pensions.
- Lead on all operational matters relating to finance, including our existing systems (Xero and ApprovalMax) as well as any new systems the Trust identifies as required.
- Lead the financial planning and partner with the Headteachers and CEO to ensure effective strategic decision making.
- Assist the Headteachers in their duty to ensure that the academy meets its educational aims and vision within budget, achieving value for money.
- Support the Headteachers and Deputies in the annual cost-centre planning and set and guide the budget setting of other middle leaders across the Trust.
- Identify capital grant opportunities and oversee the preparation of capital grant bids including CIF bids.
- Prepare a rolling programme of capital purchase plans in collaboration with the schools' leadership teams and relevant external agencies.





# Chief Financial Officer

## The Role

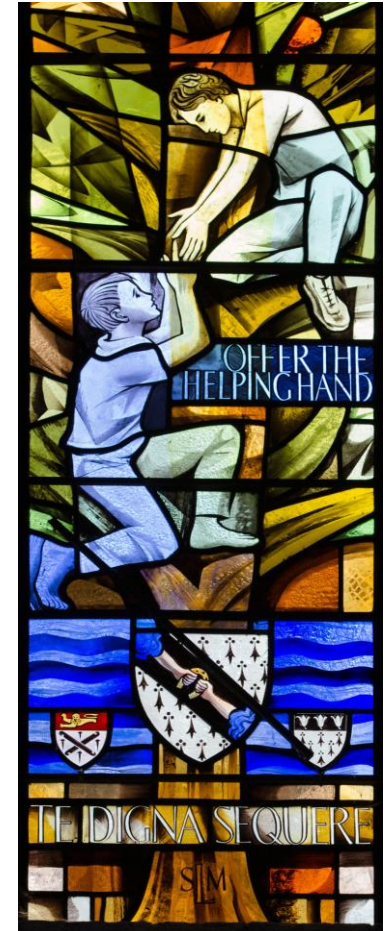
### Compliance and Risk Management

- Take the lead on risk management in the Trust, organising Risk Management meetings to identify and mitigate significant risks.
- Ensure compliance with VAT, taxation, and other liabilities, minimizing amounts due while meeting legal requirements.
- Identify financial and other risks, develop strategies for risk mitigation, and ensure appropriate insurance coverage.
- Lead the preparation of the Trust's statutory accounts in compliance with the Academies Accounts Direction and ensure an internal monitoring function through external audit.
- Act as company secretary and CFO for all MET related party entities
- Assist external and internal auditors with statutory annual accounts in line with the academy Financial Handbook and ESFA requirements whilst ensuring appropriate financial, contractual and purchasing procedures are established and maintained.
- Support the Academy Trustees and Members in meeting their financial obligations.

- Develop and implement policies and procedures for the procurement, recording, depreciation and disposal of capital assets.
- Ensure goods and services are processed in compliance with current and relevant procurement legislation.
- Participate in the management of major Trust projects.

### Financial Reporting and Management

- Develop and monitor the strategic plan for the Trust, incorporating key financial performance indicators.
- Prepare annual and three-year budgets, in-year forecasts, and other financial planning tools.
- Produce monthly management accounts, presenting them to the Trust Leader, headteachers, and Trustees.
- Manage and oversee day-to-day financial transactions, payroll, banking arrangements, and procurement processes efficiently.



# Chief Financial Officer

## Income Generation and Growth

- Prepare annual income budgets and maximize income streams, achieving economies of scale and best value.
- Identify income opportunities, grants, and formulate bids as appropriate.
- Oversee maintenance of the Trust's fixed asset registers and lead on due diligence processes for growth.
- Ensure the Director of Development is meeting all statutory requirements of fundraising management.
- Work closely with the Director of Development and the Headteachers in drawing up a strategic fundraising strategy which is feasible.
- Support the Development Office in its activities, including attendance at functions and engaging with potential donors.

## Strategic HR Oversight via line management of HR Director

- Support the HR Director to develop and implement the Trust's human resources strategy in alignment with Trust goals.
- Support the HR Director in the development of HR policies and procedures, ensuring compliance with employment laws and regulations.
- Work closely with the HR Director to ensure the payroll and HR function is compliant of audit and Ofsted requirements.

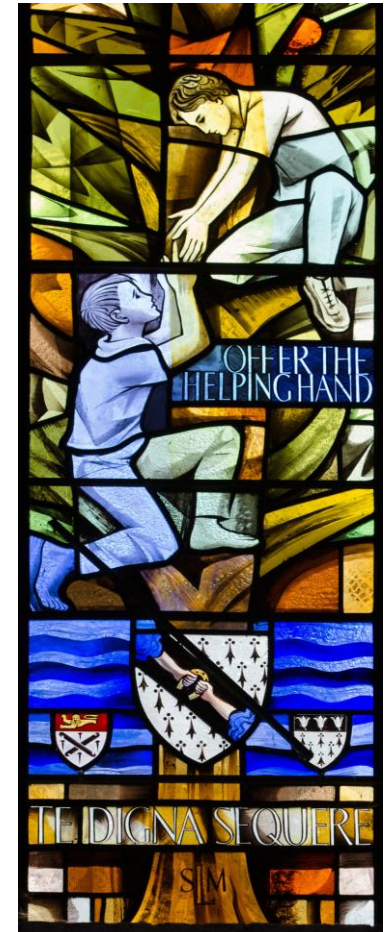
# The Role

## Team Leadership and Development

- Implement an organizational structure for the financial functions, monitoring and reporting key performance measures to the Trust Board, keeping Internal Financial (operational) Handbooks up to date.

## Leadership and Professional Development

- Promote a finance culture across the Trust that is professional, supportive, and service-driven.
- Provide leadership and mentoring to team members, keeping abreast of regulatory changes through continuous professional development.
- Deputise for colleagues as necessary and provide specialist financial advice to the executive team.
- Directly line manage the HR Director and finance assistants and perform annual appraisal reviews.

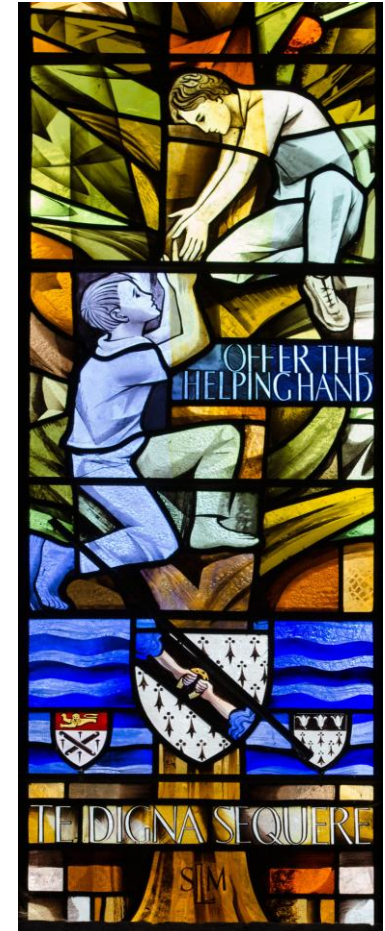


## Chief Financial Officer

As with all members of staff the post holder is required:

- To achieve service outcomes and outputs, and personal appraisal targets, as agreed with the CEO
- To undertake training and constructively take part in meetings to assist with the effective development of the post and post holder
- To be committed to the Trust's core values and ethos and to demonstrate this commitment in the way duties are carried out
- Maintain confidentiality and ensure that duties are undertaken with due regard to and compliance with the Data Protection and Equality Act at all times
- To carry out duties and responsibilities in accordance with the Trust's Health and Safety Policy and relevant Health and Safety legislation
- To demonstrate consistently high standards of personal and professional conduct; showing tolerance and respect of the rights of others whether other staff, students or parents
- To observe proper professional boundaries and having regard to the safeguarding and wellbeing of students

## The Role





## Chief Financial Officer

### Safeguarding

All staff are required to read and understand the current and future versions of Keeping Children Safe in Education, Part 1 and Appendix A along with the Trust's policies relating to Safeguarding and Child Protection, all of which are available electronically. The Trust has a clear process where every member of staff must report any concern they have about a child directly to the DSL Team. This process is outlined during induction, regularly at whole staff meetings and in weekly bulletins. Details of the DSL Team are displayed at all times in reception and around the school sites. Any queries regarding any aspect of safeguarding must be made to a member of the DSL Team.

As an education professional working at school sites, the postholder may contribute to the daily supervision of students ensuring safety and sensible behaviour and must be prepared to carry out additional duties, which may reasonably be required by the CEO and Trustees. The duties of this post may vary from time to time, as required, without changing their general character or level of responsibility.

## The Role

The Trust is fully committed to the DfE guidance on Safeguarding Children and Safer Recruitment in Education and all candidates for the post will therefore be subject to vetting procedures following Buckinghamshire Council's guidance and the Trust's Safer Recruitment Policy. All shortlisted candidates will be subject to an online search as part of the safer recruitment process.



# The Person

	Essential	Desirable
<b>Professional Qualifications</b>	<p>Educated to degree level</p> <p>Qualified accountant (ACA, ACCA, CIMA or equivalent)</p>	<p>Further professional or academic qualifications</p>
<b>Previous Work Experience</b>	<p>Senior financial management and strategic leadership either in the public or private sector with accountability for a complex resource base</p> <p>Proven track record of successful financial leadership and building effective teams</p> <p>Significant experience of leading and managing budgets, and working with stakeholders to develop strong financial understanding</p> <p>Experience of establishing financial systems and processes</p> <p>Experience in managing procurement and contracts</p> <p>Experience in the evaluation, documentation and management of financial risk</p> <p>Experience of developing and managing external relationships with professional and regulatory bodies</p> <p>Experience of working with external and internal audit teams</p>	<p>Experience of financial leadership within an academy setting</p> <p>Experience of working within an educational setting</p> <p>Experience of working with Governors, Trustees, or similar</p> <p>Experience of grant bid writing</p> <p>Change management experience</p>



# The Person

	Essential	Desirable
<b>Knowledge</b>	<p>Detailed and up to date knowledge of accounting and professional codes of practice</p> <p>Awareness of and respect for the highly sensitive status of information and its confidentiality</p>	<p>Knowledge of academy financial reporting; including statutory accounting, the academies handbook and other ESFA returns</p> <p>Up to date knowledge of Data Protection, GDPR and Freedom of Information Act</p> <p>An understanding of school funding streams</p>
<b>Previous Work Experience</b>	<p>The ability to present complex information with knowledge and confidence to meet the needs of wide stakeholder groups from diverse backgrounds</p> <p>Excellent analytical skills</p> <p>Excellent communication skills</p>	<p>Excellent wider IT skills</p> <p>Specific experience of using Xero and Approval Max</p>
<b>Personal</b>	<p>The highest level of integrity and professional standards</p> <p>Ability to foster good relationships with internal and external stakeholders</p> <p>Appropriate motivation to work with children</p> <p>A genuine interest in supporting education</p>	<p>An interest in environmental matters</p>





# How To Apply

**Please do contact us with any queries or if you would like to discuss your situation with us first.**

**For an application form please visit [www.marlowet.org](http://www.marlowet.org)**

## KEY DATES

*Deadline for application*

**9.00am Friday 9th February 2024**

**Applications submitted via email should be sent to Mrs Anna Summerfield, HR Director at [asummerfield@swbgs.com](mailto:asummerfield@swbgs.com)**

The Marlow Education Trust is fully committed to the DfE guidance on Safeguarding Children and Safer Recruitment in Education and all candidates for the post will therefore be subject to vetting procedures following Buckinghamshire Council's guidance and the Trust's Safer Recruitment Policy. All shortlisted candidates will be subject to an online search as part of the safer recruitment process.

