### Job Title:
Director of Finance and Operations (DFO)

### Grade:
Equivalent to LA Grade 14  0.6 FTE (currently £24.70 - £27.33 per hour)

### Base/Location:
Inspiring Primaries Academy Trust Head Office

### Responsible To:
Trust Leader (Chief Executive Officer)

### Responsible For:
Management of Inspiring Primaries Academy Trust finance & operations

### Key Relationships/Liaison with:
- Trust Leader
- Trust Board
- Finance & Audit Committee
- School Leaders
- Hub Business Managers
- Internal & External Auditors
- and other advisers

## Job Purpose

- To be responsible for the strategic financial, corporate, commercial and operational management of the trust. This role is an integral part of the strategic leadership of the trust.
- The DFO role will focus on three key areas:
  - To provide direction and leadership on strategic financial and business planning and risk management for the trust to ensure that it has clear, sustainable and legally compliant financial plans for the future;
  - To provide direction and leadership on all matters relating to financial compliance, human resources, estate management, IT systems, health and safety and administration across all schools in the trust to ensure the best possible outcomes for all pupils;
  - To work with the Trust Leader to maximise financial efficiencies and earned income from the trust's assets, including commercial trading, intellectual property and joint ventures through an enterprising approach to business development and partnerships.

## Main duties and responsibilities

This is an executive post that will need to respond to significant changes and developments over time. The post holder will need to be visionary, decisive, responsive and proactive and so it is not possible to specify a full list of responsibilities. However, responsibilities fall into three main strands:

- **Strategic**
- **Operational**
- **Line management and team development**

In no order of importance, the DFO will be responsible for:

1. the administrative, financial, and risk management operations of the trust; supporting its efficient and effective operations and its preparations for future growth;
2. making a key contribution to the development of overall trust strategy, challenging assumptions, decision-making and providing financial analysis and guidance on all activities, plans and targets;
3. ensuring that trust financial systems are robust and able to support current activities and future growth;
4. accounting, finance, forecasting, strategic planning, due diligence, financial analysis of academies joining the trust and any related financial negotiations;
5. supporting the Trust Leader in assuming a strategic role in the overall leadership and management of the trust;
6. supporting the Accounting Officer, ensuring trust compliance with accounting and other legal and statutory requirements and the trust's funding agreement, including arrangements for internal and external audits.

## Strategic responsibilities

1. Support the Trust Leader in the strategic leadership of all non-educational functions across the trust.
2. Support the Trust Leader in the formulation, monitoring and evaluation of the business plans and financial strategies, ensuring the viability and sustainability of the trust.
3. Advise and support the Trust Leader (as Accounting Officer) on financial propriety and control issues.
● Lead on the development and implementation of robust trust systems, procedures and policies relating to business, finance, organisational compliance and risk, ensuring compliance with all relevant statutory procedures and law.
● Lead on tactical initiatives as appropriate.
● Identify and lead the development and implementation of administrative and business efficiencies to release resources for other uses.
● Devise and implement financial, treasury and tax strategies.
● Provide strategic recommendations to enhance financial performance, efficiencies and new income opportunities.
● Ensure effective internal controls are in place and compliance with applicable financial regulatory legislation and guidance.
● Develop a due diligence and new academy integration strategy and operational plan.

**Operational responsibilities**

- Oversee all transactions and processing systems.
- Implement operational best practices.
- Prepare and implement an annual prioritised Finance and Operations Improvement Strategy.
- Be responsible for the financial, operational and due diligence aspects of new academies joining the trust.
- Devise and implement a system of accurate, timely and appropriate internal financial reports to facilitate effective budgetary control, evaluation, decision making and sound strategic planning.
- Secure robust trust financial governance and internal control.
- Prepare a capital programme for approval and implementation.
- Develop and maintain financial systems and records to ensure they are current and compliant with statutory regulations and relevant guidance.
- Integrate new academies into existing systems.
- In consultation with the Trust Leader and senior colleagues, oversee the preparation of the trust annual financial budget and updated forecasts, forecasts for corporate strategies and plans.
- Lead the development and maintenance of financial systems and procedures, including appropriate financial IT systems.
- Secure robust trust financial governance and internal control.
- Prepare a capital programme for approval and implementation.
- Develop and maintain financial systems and records to ensure they are current and compliant with statutory regulations and relevant guidance.
- Integrate new academies into existing systems.
- In consultation with the Trust Leader and senior colleagues, oversee the preparation of the trust annual financial budget and updated forecasts, forecasts for corporate strategies and plans.
- Lead the development and maintenance of financial systems and procedures, including appropriate financial IT systems.
- Build close and effective working relationships with key advisers and partners.
- Provide leadership and support for major trust projects as required by the Trust Leader.
- Identify and exploit potential funding and income generation opportunities to support trust development.
- Work with individual academies to maximise income generation/funding and reduce administration costs.
- Coordinate the management of capital funding, whether through bids or capital allocation process.
- Maintain the trust accounts in accordance with the funding agreement and ESFA Academies Financial Handbook and in accordance with the financial regulations and procedures of the trust.
- Oversee the preparation of the annual accounts to prescribed standards and take responsibility for the completion and submission of regulatory reporting.
- Liaise, on behalf of the Trust Leader, with the RSC and ESFA on financial matters.
- Manage the cash position of the trust and its operating activities.
- Develop and manage the trust procurement processes.

**Line management / Finance and operations team development**

- Create and lead a challenging, responsive and collaborative Finance and Operations (F&O) Team that works in partnership with all areas of the trust.
- Ensure high professional standards, and integrity throughout the F&O Team.
- Ensure that the F&O Team seeks continuing improvement in its business management and financial systems.
- Manage the effective appraisal of all members of the F&O Team.
- Secure the continuing professional development of the F&O team to ensure expertise, capacity for improvement and effective succession planning.

**General**

- Attend Trust Board and Finance and Audit Committee meetings and external national and regional events.
- Review or prepare formal papers for policy and review.
Comply with and uphold, in all respects, the trust codes of practice on safeguarding, equality and diversity.

Performance measures

6. Accurate and timely financial returns to statutory agencies.
   - Accurate, timely and high quality internal management information on financial matters, including cash flow, budgetary control and capital expenditure
   - Achievement of streamlined and cost-effective processes for financial administration.
   - The trust remains within its budget and maintains a prudent surplus.
   - Trust accounts should be unqualified.
   - Sustainable forward budget plans should be in place.
   - Trust operational performance should be in line with comparable organisations.
   - Effective estate management plan in place.

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 in disaggregated time, as required.
- To participate in other continuing professional development opportunities, as required or agreed.
- To participate fully in team self-reviews and other agreed procedures for monitoring the quality of the Trust.
- To comply with all financial, safety, data protection, IT software licensing, child protection and equal opportunity requirements and any other relevant guidelines.
- To undertake any other reasonable duties as may be agreed from time to time with the Trust Leader.
- This post is subject to a Medical Check and a check being carried out at an enhanced level by the Disclosure and Barring Service.

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.

Inspiring Primaries Academy Trust is seeking to promote the employment of disabled people and will make any adjustments considered reasonable to the above duties under the terms of the Equality Act 2010 to accommodate a suitable disabled candidate.
## Person Specification

### Job Title:
Director of Finance and Operations (DFO)

### Grade:
Equivalent to LA Grade 14 0.6 FTE

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<thead>
<tr>
<th>Qualifications</th>
<th>Essential</th>
<th>Desirable</th>
<th>How assessed</th>
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<tr>
<td>● Educated to degree level or equivalent</td>
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<td>● Qualification in accountancy and business management</td>
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<td>● Evidence of continued professional development and learning.</td>
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<th>Experience</th>
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<tr>
<td>● Extensive experience of staff leadership, management and development including evidence of leading performance improvement.</td>
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<tr>
<td>● Experience of strategic business or service planning and the development of business and educational opportunities.</td>
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<td>● Experience in successfully leading the acquisition and integration of new entities into an existing organisation’s structure and systems.</td>
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<td>● Experience of procuring and managing services and contracts to ensure that value for money and key performance indicators are met.</td>
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<td>● Successful track record of managing projects from inception to completion.</td>
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<td>● Experience of asset and facilities management.</td>
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<td>● Experience in successfully managing multi-site organisations.</td>
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<td>● Track record of successful fund and profile raising activities.</td>
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<td>● Experience of interpreting Government education policy and legislation.</td>
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<th>Knowledge</th>
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<tr>
<td>● Extensive knowledge and experience of premises, Health and Safety regulations.</td>
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<td>● Knowledge of compliance, policies, systems and procedures relevant to the job.</td>
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<tr>
<td>● Knowledge of Government Policy around Academy Conversion and Multi Academy Trusts.</td>
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<td>● Awareness of current IT developments.</td>
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<td>● Knowledge of the importance of confidentiality.</td>
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<th>Skills and Competencies</th>
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<tr>
<td>● Excellent communication and IT skills.</td>
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<td>● Demonstrable ability to work strategically and to seek and implement creative solutions.</td>
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<td>● Inspirational leadership and interpersonal skills, utilised to challenge colleagues, peers and teams.</td>
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<td>● Ability to work across multiple sites, regularly travelling between settings.</td>
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<td>● Ability to perform well under pressure.</td>
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<td>● Decisive, able to arrive at well-considered judgements.</td>
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<td>● Flexible, able to meet the peaks and flows of work.</td>
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<th>Other Requirements</th>
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<td>● Evidence of regular attendance at work.</td>
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<td>● An understanding of, and commitment to Equal Opportunities, and the ability to apply this to all situations.</td>
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<td>● Must be able to perform all duties and tasks with reasonable adjustment, where appropriate, in accordance with the provisions of the Equality Act 2010</td>
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Key: App = Application Form; Test = Test; Int = Interview; Pre = Presentation; Med = Medical Questionnaire; Doc = Documentary Evidence e.g. certificates