



CHIEF FINANCIAL OFFICER

CANDIDATE PACK

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CEO WELCOME LETTER



Dear Prospective Applicant,

Welcome to Synergy Multi-Academy Trust and we are delighted that you have shown an interest in our Trust and what we endeavour to achieve. As a Multi-Academy Trust of fifteen schools we believe that we are **'Stronger Together'** which underpins our vision of **'Shaping Futures through Knowledge, Aspiration and Courage'**. Our core values are at the heart of everything we do and we believe in the importance of Inclusion, Collaboration and Ambition.

As an Educational MAT we serve a large community of learners in excess of 4,700 pupils and 730 staff, with an annual income of £31.17 million. I took up post in September 2023 and we have worked hard over the past year reviewing our central structures and developing our central leadership team. The role of CFO at Synergy MAT is an extremely important one. We're looking for a colleague who understands the educational landscape and the needs of our schools, as well as being able to communicate the importance of financial literacy and probity and work with our leaders to ensure effective cost-saving measures are implemented in a clear and timely manner, alongside developing effective relationships with our Headteachers, Heads of School and Central Team Leads.

We are looking for an experienced finance professional, who will lead our Finance Team and act as the Trust's Chief Finance Officer (CFO), providing leadership and

management on all aspects of finance and playing a pivotal role in providing clear financial and commercial strategy and direction for the Trust. Full details of what we are looking for are within the external advert, job description and person specification. If you are confident that you have the skills, experience and qualifications to lead our Finance function, we sincerely hope that you will apply for this post. The finance team based at Synergy House in Reepham are effective and hard-working. We work with Schools' Choice as our payroll provider, alongside a model of hybrid HR support, overseen by our Director of People, who took up post in March 2024.

Benefits include hybrid and/or flexible working, 29 days annual leave rising to 32 days after five years' service (plus Bank Holidays), free onsite parking and ability to join the local government pension scheme.

We appreciate the time it takes to apply for such a pivotal role. Myself and our Senior Financial Accounting Officer, Niki Goves, are happy to have informal confidential conversations with any colleagues who are interested in working with us.

I look forward to receiving your application.

Best wishes,



Lou Lee.



ABOUT SYNERGY MULTI ACADEMY TRUST

Synergy Multi Academy Trust is a family of 15 schools spread throughout rural mid and north Norfolk, serving children from ages 2 to 18.

The Trust currently comprises 11 primary schools, three high schools (two of which have sixth forms attached) and one all through school.

Our Schools

-  Antingham and Southrepps Primary School & Nursery
-  Astley Primary School
-  Bawdeswell Primary School
-  Corpusty Primary School
-  Cromer Junior School
-  Fakenham Infant & Nursery School
-  Fakenham Junior School
-  Foulsham Primary School
-  Gresham Village Primary School & Nursery
-  Litcham School
-  Mattishall Primary School
-  Reepham Primary & Nursery School
-  Reepham High School & College
-  Sheringham High School & Sixth Form
-  Stalham High School

Schools are supported through regular meetings between school leaders and subject leader networks, and opportunities to share best practice. There is a programme of Trust wide CPD events and investment in training for all staff, not just teachers. There is an emphasis on staff wellbeing, with elements of the 'core offer' including access to the Norfolk Support Line, flu jabs for staff not eligible through the NHS, membership of the Cycle to Work Scheme and Wellbeing as a standing agenda item for Local Governing Bodies.

Our primary schools are developing a shared curriculum using White Rose Maths and Read Write Inc. and secondary schools have wide ranging curriculums, aimed at allowing every student to achieve their full potential.





OUR VISION

Transforming children's lives through education

Synergy is a Multi Academy Trust that aims to transform children's lives through education.

We want to be a strong Trust:

- Putting the quality of education at the core of our work, with a high quality curriculum in each school, underpinned by a clear pedagogical approach.
- Developing staff and paying close attention to wellbeing, with high quality evidence based professional development as a core element of the Trust.
- Enabling schools to focus on the quality of education by providing efficient and effective central services.
- Providing strong governance at all levels of the organisation.
- Fulfilling our wider purposes of public benefit and civic duty.

We want every pupil attending a Synergy school to benefit from:

- Excellent teaching.
- An excellent curriculum.
- Excellent opportunities to develop and thrive as an individual, so that they can progress well beyond school.

We want the Trust to be underpinned by a culture which is aspirational, outward-looking and caring.

We want our schools to genuinely collaborate together to ensure that all pupils, regardless of their background, receive an excellent education and leave with the qualifications, skills and qualities that they need to succeed in life.

We believe that all of our schools have strengths and areas to develop, and that all can improve through sharing expertise and wisdom. The Trust understands that there will be excellent practice in each school and that every school will be able to contribute to the development of the Trust as a whole.

The Trust is proactive and always looking to evolve, so that it can be as strong as possible.



OUR AIMS

The Trust aims to:

- Provide a network of excellent schools.
- Achieve strong results.
- Close attainment gaps for disadvantaged pupils.
- Provide high quality inclusive education.
- Turn around challenging schools.
- Provide a shared approach whilst maintaining the distinct ethos, character and autonomy of each school.
- Attract and retain staff who enjoy working in our schools, are fulfilled and developed.
- Value each member of our professional community and value their health and wellbeing. This is enshrined in our staff charter.
- Train outstanding teachers, prioritising their development throughout all stages of their career.
- Be actively involved in local and national educational research.
- Provide training for aspiring teachers of the highest quality through School Direct and PGCE.
- Provide an alumni community to support current and former pupils into rewarding careers through events, apprenticeships, internships, networking and mentoring opportunities.

Our schools aim to give every pupil, regardless of their background, the confidence, resilience and opportunity to ultimately go on to pursue the career of their choice, pursue life-long learning, and attend the university of their choice if that is their preferred pathway.

Our schools will:

- Provide excellent teaching.
- Provide a broad, balanced, equitable, evidence-based curriculum that is knowledge rich and builds sequentially and cumulatively from year to year. The curriculum will have depth as well as breadth.
- Provide a curriculum that ensures aspiration for pupils and a global perspective.
- Provide significant opportunities to learn beyond the classroom.
- Have high expectations.
- Know every child.
- Provide high quality inclusive education for all pupils, including those with special educational need.
- Ensure exemplary behaviour.
- Believe that they should always be learning.

We are supported through a range of strong partnerships to help us deliver this including the Norwich Research School, which aims to develop the use of effective research to further improve teaching and learning.



JOB DESCRIPTION

RESPONSIBLE TO:	Chief Executive Officer
RESPONSIBLE FOR:	Financial Management of the Trust. Line management of the finance team
PLACE OF WORK:	The post holder will be based at Synergy House, located in Reepham, with regular travel to our primary and secondary schools and optional flexible working. Flexible working would include one day per week working from home, with the clear expectation that the successful candidate would be leading the finance team based at Synergy House, alongside regular school visits four days per week.
HOURS:	Full time, 37 hours per week
SALARY:	To be negotiated with the successful post holder Scale N 47 £62,523 to Scale N £69,766. A spot salary up to £75,500 would be considered for an outstanding candidate.
RIGHT TO WORK:	This appointment is subject to verification of the right to work in the UK. Where the successful candidate has worked or been resident overseas in the last five years, such checks and confirmations will be required in accordance with the statutory guidance.

STAFF BENEFITS:

Synergy Multi-Academy Trust recognises its employees as the most important asset and critical to its success. To demonstrate this all staff are offered the following benefits:

- A supportive ethos and concern for the well-being of all colleagues.
- Excellent CPD opportunities and career progression.
- Employer Contributions to the Local Government Pension Scheme.
- Cycle to work scheme.
- Employee Assistance Programme.
- Employee of the Month Programme.

JOB DESCRIPTION

PURPOSE OF THE ROLE:

The CFO will be responsible for the financial management and sustainability of the Trust and for the financial probity of this publicly-funded Multi-Academy Trust. The post holder will be responsible for providing leadership and management to the Trust's finance function and will enable the Trust to deliver its educational aims and objectives.

The CFO will also have a key role in supporting the CEO in their role as the Trust's Accounting Officer, in line with the Academy Trust Handbook.

Key responsibilities include:

- Strategic financial leadership
- Financial management and control
- Preparing and monitoring budgets and delivering annual accounts
- Participation in relevant Executive Team, Trust Board and Local Governing Body meetings, ensuring that the CEO, Executive Team, Trustees, Principals and Governors are fully informed, as required.

MAIN RESPONSIBILITIES AND TASKS:

The duties and responsibilities listed below are indicative of the tasks the CFO of Synergy Multi-Academy Trust will perform and are not intended to be an exhaustive list. The post holder will be expected to take on additional responsibilities appropriate to the role as they arise.





JOB DESCRIPTION

Strategic financial leadership

The CFO will be accountable for supporting the Trust's strategic development and aims through effective financial planning and management, in line with regulations.

The CFO will:

- Advise the CEO, Trust Board and other Trust leaders on all matters relating to financial strategy and management.
- Contribute to the development and implementation of the Trust's strategy, providing financial analysis and guidance on all activities, setting financial objectives and monitoring performance.
- Lead on the Trust's risk management processes, including identifying strategic, operational and financial risks, overseeing steps to mitigate these risks, and the co-ordination of the Trust's Risk Register.
- Develop, implement, monitor and take responsibility for the Trust's Annual Budget and 3 Year Plan, using effective financial and budget modelling and benchmarking to support strong decision-making.
- As needed, conduct financial due diligence on schools applying to join the Trust and report to the Trust Board and other Trust leaders with recommendations.

Financial management and control

The CFO will be accountable for maintaining robust financial management of the Trust and its academies.

The CFO will:

- Manage and lead the annual budget process, from planning through to approval, working with other Trust leaders.
- Work with the CEO, Deputy CEOs and Central Service Leads within the Trust to monitor individual academies' budgets in line with school development plans and the Trust's strategic objectives.
- Prepare, analyse and report on management accounting information, to provide Managers with timely, accurate and relevant information, and to contribute to the Trust's financial management procedures to ensure they are effective, efficient and compliant with appropriate financial statutory and regulatory requirements.
- Provide accurate and timely information to the Trust Board and other Trust leaders to enable effective budgetary control.
- Develop, implement and monitor the Trust's financial policies and procedures in accordance with the Academy Trust Handbook, enabling robust financial management.

JOB DESCRIPTION

Financial management and control - *continued*

- Take appropriate action to address financial risks, problems and irregularities, including ensuring Headteachers and Heads of School are met with on a regular and appropriate basis, given accurate information and clear directives on budgetary spend and cost-saving measures as appropriate.
- Develop and maintain an effective internal audit procedure for the Trust and its academies, including engaging third party audit reports and making recommendations for improvement. Manage the external audit procedures for the Trust and its academies, as part of the Annual Report & Accounts, and follow up on any recommendations resulting from audits.
- Establish and monitor effective procurement procedures, in order to achieve financial efficiencies, including oversight of the tendering process for major purchases.
- Work with the CEO to oversee the Trust's commercial contracts, ensuring they represent value for money.
- Arrange and manage necessary insurance arrangements for the Trust.
- Manage the Trust's tax and National Insurance arrangements. Ensure claims for VAT and business rates are submitted and refunds are received and accounted for appropriately.
- Manage the Trust's cash position at all times, including overseeing bank deposits and ensuring that the Trust is a going concern.

Reporting and compliance

The CFO will be accountable for ensuring that the Trust complies with its legal obligations, adheres to financial regulations and submits accurate financial reports in a timely manner.

The CFO will:

- Complete and submit financial returns as required by the Department for Education, the Education and Skills Funding Agency, the Charities Commission and Companies House.
- Prepare and submit the Trust's financial returns and reports, including annual accounts and monthly management accounts.
- Maintain the Trust's accounts in line with the funding agreement and the Academy Trust Handbook.
- Work with the Director of People and Schools' Choice to monitor developments to legislation around payroll, pensions and benefits, implementing changes and adapting processes as required
- Provide appropriate and timely reports to the Trust Board and other Trust leaders to support effective leadership and governance.



JOB DESCRIPTION

Leadership and management

The CFO will be accountable for supporting the effective management of the Trust and its academies, and for providing motivational leadership at all levels of the Trust's organisation.

The CFO will:

- Take responsibility for the Trust's financial management systems, Hoge and IMP, including managing user access, providing training, considering future system developments and generating reports.
- Manage the Trust Finance Team, taking responsibility for their professional development and ensuring best practice is observed at all times.
- Develop the Trust's Corporate Services, alongside Central Service Leads, ensuring these are fit for purpose and provide a high-quality, value for money service to individual schools, helping the Trust achieve continuous improvement.
- Work with the Director of People to support the effective delivery of payroll services for the Trust and its academies.
- Develop effective relationships with the Trust's stakeholders and partners, in order to support its development and operation.
- Act as a representative for the Trust in external networks and forums, raising the profile of the Trust, engaging with the wider sector, and ensuring that the Trust is alert to information, changes and opportunities that could affect its work.

GENERAL

Available to work flexible hours as the operational needs of the Trust require.

To be aware of, and comply with, Synergy MAT policies and procedures, including those relating to child protection, health and safety, security, confidentiality and data protection, reporting all concerns to the appropriate person.

To participate in training, learning activities and performance development as required.

Whilst every effort has been made to explain the main duties and responsibilities of the post, each individual task undertaken may not be identified and the post holder may reasonably be expected to undertake other duties commensurate with the level of responsibility that may be allocated from time to time.

The Job Description will be subject to periodic review.

SAFEGUARDING

As an educational trust, Synergy Multi-Academy Trust is committed to the safeguarding and promotion of the welfare of all children and young people. Therefore, the Trust expects all members of staff and volunteers to share in this commitment. To this end, both an 'Enhanced Disclosure and Barring Service' check and a 'Barred List' check are required for this role.

PERSON SPECIFICATION

KEY ACCOUNTABILITIES	ATTRIBUTES AND PERSON SPECIFICATION
Qualifications & Training	<ul style="list-style-type: none"> • Qualified to degree level (Desirable) • Professional finance or finance related qualification at graduate level (i.e. ACA, ACCA, CIMA, CIPFA, MAAT or equivalent) (Essential) • Record of CPD relevant to Leadership/Financial Management • Evidence of updating professional skills and knowledge, including training in the area of school / trust / charity finance an advantage
Experience	<ul style="list-style-type: none"> • A proven track record of successful leadership and management experience, at a senior level (Essential - within a school/trust/charity setting, ideally the SEND education sector) • Experience of leading an organisation through a period of budgetary reduction, growth and expansion • Experience managing significant financial resources with a good appreciation of relevant regulatory frameworks • In depth knowledge of statutory requirements, procedures and regulatory requirements relating to academies/academy trusts (Desirable) • Familiarity with financial processes and procedures, including those related to internal/external audit • Demonstrable experience of successful people management and staff development • Experience of using and supporting others in the use of financial software packages (Desirable) • A proven track record of commitment to promoting, implementing and monitoring the wellbeing, professional learning, equal opportunities and diversity for all
Key Skills and Competencies	<ul style="list-style-type: none"> • High level of IT competence, literacy and numeracy skills • Understanding of IMP and or other MAT/Organisational Software systems such as Sage, Hoge etc • Ability to set and monitor budgets, within the given parameters, and inform/be responsible for Risk Management • Knowledge of statutory and regulatory accountability frameworks relevant to the role, including the Academy Trust Handbook, Charity Commission Guidance, etc. • Sound understanding of school finances and financial management • Understanding of school estates/resources management and relevant risk management

PERSON SPECIFICATION - *CONTINUED*

KEY ACCOUNTABILITIES	ATTRIBUTES AND PERSON SPECIFICATION
Personal Qualities	<ul style="list-style-type: none"> • The highest level of integrity and sense of moral purpose • Excellent skills in strategic planning and strategic management of financial resources • Approachable listener, with excellent interpersonal and 'people management' skills • A team player who is personable and emotionally intelligent • Ability to inspire and motivate staff – strong persuasive, influencing and interpersonal skills with the ability to communicate effectively, calmly and confidently • Ability to present financial information to diverse stakeholders • Decisiveness and consistency, with a focus on solutions and an ability to make decisions/recommendations based on the analysis of options • Ability to work autonomously whilst demonstrating loyalty and collaboration, within the wider accountability structure of the Trust • Capacity to work under pressure to meet deadlines and organisational priorities • Good organisational skills in order to plan, lead and delegate effectively, valuing the contributions of all • Flexible with regards to working patterns and evolution of the role • Resilience and the ability to support the Trust through effective change management • Commitment to staff's and own personal development
Other requirements	<ul style="list-style-type: none"> • An ability to travel between schools / trust sites and provisions



HOW TO APPLY

If you would like to discover more about this exciting opportunity, need any further information or you wish to have an informal discussion, please contact our retained consultant at Academicis: Rebecca Beach: rbeach@academicis.co.uk or 01223 907979 / 07733 628155

Please apply for this role by visiting the link below:

www.mynewterm.co.uk

Closing date: Monday 1st July 2024

Shortlisting date: Wednesday 3rd July 2024

Interviews: W/C Monday 8th July