



Additional information



JAMES COOK
LEARNING TRUST

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About the Trust

James Cook Learning Trust formed as a Multi Academy Trust on 1st September 2018, consisting of four schools;

- Captain Cook Primary School
- Lingfield Primary School
- Marton Manor Primary School
- The Avenue Primary School

We are located in the south of Middlesbrough, close to the border with North Yorkshire and Redcar and East Cleveland. We currently serve 1195 pupils and receive an income of £5,500,000. As a group of schools we have a long history of collaboration, working together on joint initiatives to improve outcomes for our pupils. Through the formation of the MAT, the level of collaboration has increased with staff across the four schools working far more closely together. The key area the CFOO will lead on is the business operations within the Trust, ensuring that we are using resources appropriately to the maximum benefit whilst at the same time keeping up with the latest requirements from the DFE and the ESFA.

We have aspirations to grow. This presents a very exciting opportunity for the successful candidate. They will play a key role in ensuring our growth strategy allows us to grow in a financially sustainable manner whilst at the same time making sure we benefit from the many opportunities expansion will bring.



Vision, Mission and Values

Vision

James Cook Learning Trust is committed to providing excellence, we aspire for our academies to be outstanding in all that they do. We want our schools to be well led and staffed by valued teams who provide excellent teaching and care. We believe that by working collaboratively we will enhance the quality of education in our schools and ensure that every child has the skills, knowledge and understanding to be successful as they continue their learning journey.

Mission

- Through excellent partnership with our parents and carers, home and school work together to develop well rounded, young people who are keen to learn, understand the need to care for others and to contribute positively to their communities.
- Our academies are exciting places to learn, they are well-resourced and managed through a clear framework of sustainability.
- Our academies are outward facing, we work with others to develop and share our expertise across Middlesbrough and beyond.

Values

- We make a positive difference to the lives of our children and families.
- We value and respect the diversity of our schools and wider community.
- We help and support each other in times of challenge.
- We understand that every decision made is in the best interest of all the children across our schools and Middlesbrough.
- We believe that everybody has the right to succeed with the appropriate support.



Our Academies

School Name	Number on Roll FTE	Age Range	Ofsted Rating	Website
Captain Cook Primary School	420	3-11	Good	https://www.captaincookprimary.co.uk/
Lingfield Primary School	225	3-11	Good	http://lingfieldprimary.co.uk/
Marton Manor Primary School	226	3-11	Good	http://www.martonmanorprimary.co.uk/
The Avenue Primary School	324	3-11	Good	https://www.theavenueprimaryschool.co.uk/
Trust Website				http://jamescoolearningtrust.org.uk/



Job Description

Main Responsibility

The Chief Finance and Operations Officer will lead and manage the business aspects of The James Cook Learning Trust.

The post holder will provide high quality leadership and management of the Trust's business function, contributing to the preparation, implementation and review of the Trust's improvement and growth plans. They will provide strategic and operational leadership in all aspects of business activities within the Trust's schools and be accountable for the operation, maintenance and development of systems, processes and procedures relating to budget, finance, administration, HR, premises, including ICT and health and safety.

Key Responsibilities

Strategic Financial Responsibilities

- Provide strategic leadership and management of the Trust's finances, advising the Trust Board, the CEO, Head Teachers and relevant committees on all financial matters.
- Take overall responsibility for the annual budget; take the lead role in developing, setting and monitoring the annual budget.
- Advise the Academy Trust at Board meetings on financial strategy which supports and develops the educational aims, ethos and growth strategy of the multi academy trust.
- To ensure the financial sustainability of the Trust through the long term financial plan.
- To develop and improve financial control and risk management systems ensuring that these are implemented effectively across the trust and are administered in line with the Trust's Financial Scheme of Delegation.
- Develop robust financial management policies, processes and reporting systems that satisfy both internal and external audit requirements.
- Ensure that Financial Standards are complied with in line with current legislation, EFA requirements and the funding agreement with the DFE.
- Develop implement and manage appropriate administrative systems and procedures across the trust and conduct regular reviews across the admin team to find improvements.
- Present financial reports to the Finance Committee focusing on future projections, benchmarking and value for money.
- Produce and present regular detailed financial reports on revenue and capital funds to The Trust Board and relevant committees.
- Benchmark financial performance against other schools and multi academy trusts and present this information to trustees on a regular basis.
- To take overall responsibility for the financial function including the production of all monitoring of monthly management accounts, control accounts and bank reconciliations.
- Liaise with external regulators and advisers, such as lawyers and auditors.
- Oversee the implementation of all audit recommendations across the trust.
- Monitor changes in relevant legislation and the regulatory environment and taking appropriate action.
- To ensure that all funding is appropriately secured and issues are properly escalated and resolved including the oversite of census returns.

- To oversee specific funding stream expenditure across the trust, e.g. Pupil Premium and Sports Premium funding.
- To oversee the overall management of payroll issues including the checking of all payroll costing information into the finance system.
- Prepare and maintain the Trust's risk register.

Procurement of Services

- Manage best practice in procurement, ensuring public purchasing requirements are met, obtaining and evidencing value for money, including contract negotiation and tendering.
- To oversee tenders for service contracts and cost effectiveness.
- Continually review of all contracts to ensure that Trust wide savings are made and best value is achieved.

Line Management Responsibilities

- Undertake effective line management and personal development reviews and training of all trust administration and caretaking staff.
- To provide support and guidance to any staff in individual schools with financial responsibility.

Governance

- Take responsibility for the role of Company Secretary ensuring the Trust complies with standard financial and legal practice and maintains standards of corporate governance.
- Advise members of the legal, governance, accounting and tax implications of proposed policies.
- Develop and oversee the systems that ensure the company complies with all applicable codes, in addition to its legal and statutory requirements.
- Lead the effective management and review of operational policies.
- Preparation and submission of required returns to statutory bodies, i.e. EFA, Charities Commission, HM Revenue and Customs.
- Preparation of the annual report for all members.

Marketing and Development

- Develop, deliver and implement a marketing strategy to support the growth of the Trust.
- Actively work in partnership with local schools to build relationships and market the benefits of the Trust.
- Research and advise on funding, grant and other income generating opportunities for the Trust.
- Prepare appropriate bids to acquire additional funds for the schools within the Trust.
- Lead the Due Diligence process in respect of schools or academies potentially joining the MAT

Human Resources

- Provide leadership and management of HR issues relating to all staff.
- Ensure interviews take place with due regard for statutory safeguarding requirements and that appropriate records are maintained.
- Ensure effective administration of relevant staff recruitment processes.
- Oversee the processes for staff induction and probationary periods.
- Ensure compliance with school policies that safeguard and protect students
- Work with the Board to ensure the Trust and all schools within it fulfil all legal requirements.

Facilities Management

- Act as the Health and Safety Officer and Fire Officer, taking the lead to ensure that the Trust meets all Health and Safety requirements and that regular review and monitoring is in place.
- Liaise with each school to develop, establish and manage effective procedures for estate management and maintenance, including an agreed disaster recovery and business continuity plan.
- Have an overview of the management of all cyclic maintenance across the trust.
- Actively develop the lettings of premises to external organisations.
- Have an overview of the management of the cleaning and caretaking arrangements.
- Be responsible for all development proposals and for the management of all capital and major development projects.
- Take responsibility for administration of all MAT's insurance policies including maintenance, correct operation and insurance of any and all school vehicles.
- To have an overview of the management of the catering arrangements across all schools.
- To carry out such other duties as are required and as commensurate with the grade for the post.
- Elements of the job description may be changed following consultation with your manager.

Place of work

- A base will be provided at one of the schools yet there is an expectation that the individual will spend time at each of the 4 schools within the 2 mile radius.

Hours of Work

- Hours of work are currently 29.6 hours per week – yet this may increase in the future based on the needs of the trust.
- Work patterns are negotiable providing the needs of the trust are met.
- The post holder may be required to work outside of normal hours on occasion, with due notice.



Person Specification

Education/Qualifications	Essential	Desirable	Evidenced by
Qualified accountant (ie CCAB qualified)	Y		Application/ Certificates
Recognised Management / Business Degree or equivalent professional qualification		Y	
School Business Manager qualification		Y	Application / Certificates
Evidence of continued professional development	Y		Application
Experience / Knowledge	Essential	Desirable	
Experience of working as part of a school senior leadership team and implementing service improvement		Y	Application / Interview
Experience of initiating, leading and managing cultural change at senior and strategic level in an organisation.	Y		Application / Interview
Experience of line management	Y		Application / Interview
A high level of commercial awareness	Y		Interview /Tasks

Successful track record of operating a substantial accounting system and computer software packages.	Y		Application / Interview
Experience of budget management and income generation.	Y		Application / Tasks
Experience of leading and supporting teams through processes of continuous improvement.		Y	Application / Interview
Knowledge and understanding of academy structures.		Y	Interview / Tasks
An understanding of the key issues facing schools and academies.		Y	Interview
An understanding of academy and school funding including high needs funding		Y	Interview / Tasks
Experience of developing and implementing successful financial strategies.	Y		Application / Interview
Experience of implementing procurement systems		Y	Interview
Have a detailed knowledge and understanding of:	Y Y Y Y		Application / Interview
<ul style="list-style-type: none"> • Charities Act accounts • Management Accounts • Computerised accounting packages • Internal control and risk management 			

Skills	Essential	Desirable	
Ability to communicate at all levels both verbally and written.	Y		Interview / Tasks
A high level of presentation skills	Y		Interview / Tasks
Ability to think strategically and to analyse complex situations, formulating and implementing plans of actions.	Y		Interview / Tasks
Ability to handle data and information critically accurately and effectively.	Y		Tasks
Marketing planning and implementation skills developing appropriate strategies and achieving successful results.	Y		Interview
Competent in the use of ICT including the use of SIMS, Microsoft Word and Excel	Y		Application
Capable of working with and achieving income targets.	Y		Interview
Ability to work with colleagues and contracts from a range of backgrounds.	Y		Application / Interview
Ability to be an autonomous practitioner and to ensure that decisions implemented are in the best interest of the Trust	Y		Application / Interview
Highly developed organisation skills managing time well to meet competing priorities	Y		Application / Interview

Ability to prioritise workloads and manage delegation of work effectively.	Y		Interview / Tasks
Self- motivated, flexible and adaptable.	Y		Interview
A proactive approach to change with the ability to think laterally and influence across the trust.	Y		Interview
Effective leadership skills with the ability to motivate and steer others towards achieving successful objectives.	Y		Application / Interview
Meets safeguarding requirements to work with children/ young people.	Y		Application

Application Process

If you believe you fulfil the above criteria and would relish the opportunity of making a significant contribution to the lives of young people, we would very much look forward to hearing from you.

Please use the application form provided and no more than two sides of A4, font size 10 for a supporting letter/statement.

Visits can be arranged by contacting the CEO, Phil Thackstone on 01642 319918 or via;

phil.thackstone@mcschools.org.uk

All applications to be retuned by email to the following email address;

vacancies@jclt.org.uk

Closing Date: Friday 15th November, 12:00pm.

Interviews: Friday 6th December.