



Bellevue Place

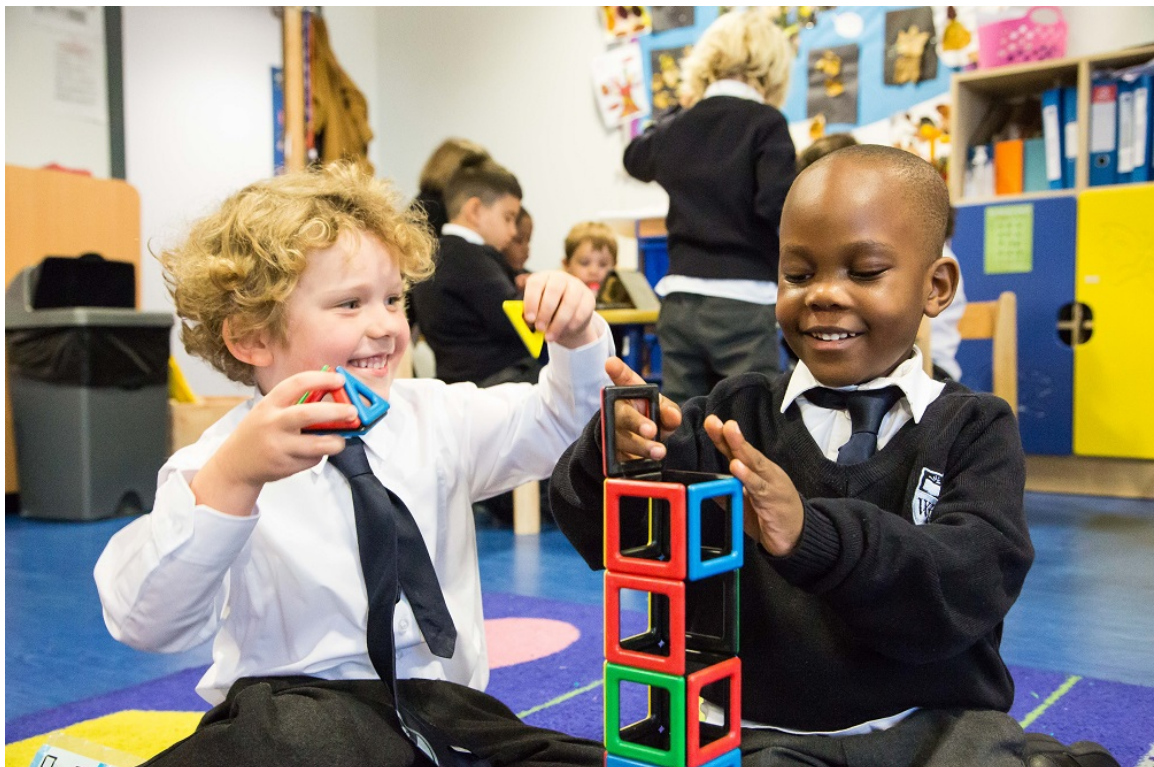
E D U C A T I O N T R U S T

Learn, Enjoy, Succeed

Director of Finance

Candidate Information Pack

September 2019



LETTER OF INTRODUCTION

On behalf of the Board of the Bellevue Place Education Trust (BPET), I would like to thank you for your interest in the role of Director of Finance. Your interest in BPET coincides with one of the most exciting phases in our development and I hope that, after having read the contents of this pack and undertaken other research, you will feel inspired to take your interest further and submit your application.

All members of the BPET team are committed to providing the very best opportunities for every young person we educate to achieve their potential. There is a belief in BPET that outstanding achievement in our schools can be realised more quickly and with greater sustainability through proactive collaboration. The strong sense of moral purpose that is our hallmark has helped to create an environment within which all leaders take a collective responsibility for the learning and success of all the pupils in our care.

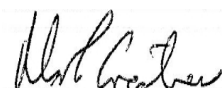
We promote a culture in which openness to peer and external scrutiny and an active willingness to share and promote the very best practice, are key factors in the improvement in our schools. Furthermore, we are committed to supporting and learning from the education community across London and the surrounding areas, and are keen to fully contribute to the benefit of the broader communities we serve.

The Director of Finance will be responsible for ensuring that BPET operates with good financial governance in line with the requirements of the Academies Financial Handbook, which is published by the Education & Skills Funding Agency (ESFA). The role will also involve liaising with the Department for Education (DfE), the ESFA, auditors, and other external advisers, suppliers and contractors.

We are looking for a Director of Finance who shares this commitment and holds values conducive to making our ambitious goals a reality. We are seeking someone who, like us, recognises that effective collaboration is the best route to outstanding achievement, and who will have an unrelenting focus on high-quality financial processes and procedures required to support the primary aims of our schools and BPET.

This candidate brief gives some background information about BPET's development to date, the nature of the Director of Finance role, the current organisation, and the key themes in our BPET 3 Year Strategic Plan. We very much hope that the opportunities and challenges facing the Bellevue Place Education Trust will excite you, as they do us, and lead to you submitting an application.

Good luck with your application.



Mark Greatrex
Chief Executive

OUR VISION – LEARN. ENJOY. SUCCEED.

Every BPET child and staff member enjoys a broad (LEARN) and enriched (ENJOY) learning experience, enabling them to achieve far greater individual success (SUCCEED) than they might previously have thought possible.

Our Mission

To grow hubs of like-minded, autonomous schools, well-supported, all of which combine academic rigour with highly enriched opportunities that deliver a personalised approach to education and exceptional outcomes for all.

Our Difference

We are leading the way in delivering high quality education through a skills-based curriculum, applying the best of the independent and state sectors to deliver breadth of opportunity and pupil enrichment. We empower all our schools as individual entities that best meet the needs of the communities they serve and have a strong relationship with parents, who are our key partners in delivering the vision.

Our Promise

Every child is an individual. Our role is to nurture pupils' potential through a personalised approach to learning. BPET children are happy, independent, confident all-rounders. We encourage a 'be interested and be interesting' attitude in children and staff alike. We don't just teach; we want our pupils to have a passion to learn. Our focus is on all pupils, regardless of background or academic ability, focusing on pupils with Special Educational Needs as well as those who are more-able.

Background

Bellevue Place Education Trust (BPET) began in February 2012 and opened its first school in September 2013. Since then BPET has grown and now operates seven primary Free School across London and Maidenhead, delivering a high quality, broad education offered to all pupils.

BPET employs over 260 staff who educate around 1,700 children, which creates increasing opportunities for staff experience and development.

As new schools, they are growing from reception-aged pupils and will have a combined capacity of 2,520 pupils when full. BPET is currently operating at 67% of total capacity in 2019/20, with all expected to be full by 2023. Of the seven schools, three are in renovated building and four have new buildings – attracting over £38.4m capital investment.

All BPET schools are judged as either Good or Outstanding by OfSTED. They were judged as follows:

- Three are Good Schools ([Watling Park](#), [Kilburn Grange](#) and [Halley House](#))
- Two are Good with outstanding features ([Rutherford House](#) and [Whitehall Park](#)); and
- Two are judged as Outstanding ([Braywick Court](#) and [Deer Park School](#))

These inspections took place over a three-year period between July 2015 and July 2018. Rutherford House School received a very positive monitoring inspection in April 2019 and over the next three-year period, we are expecting two schools to receive their next OfSTED inspection. We are strongly pushing for both to be judged Outstanding, given their breadth of curriculum and great pupil outcomes.

The achievement of pupils is very impressive across BPET. In July 2019, **80%** of pupils achieved a Good Level of Development (8% above 2019 national of 72%) and **91%** of pupils passed the phonics screening in Year 1 (above 2019 national of 82%). At the end of Key Stage 1, BPET schools performed 6% above national averages in 2019 with, **82%** of pupils at or above age-related expectations in Reading (against a national average of 76% in 2019), **75%** of pupils were at or above age-related expectations in Writing (against a national average of 69% in 2019) and **81%** of pupils were at or above age-related expectations in Maths (against a national average of 75% in 2019). This has all been achieved by our pupils receiving a rich and broad curriculum offer, in line with our vision.

We are proud of the provision offered and this includes extra-curricular provision, where BPET schools offer an enhanced number of activities, with 220 before and after school clubs being run across BPET each week! 80% of all our pupils take part in at least one club a week, which enriches further the broad and balanced curriculum we offer.

Parental support for our schools is also very high, with a parental survey in May 2019 showing that 92% of our parents are likely or very likely to recommend the school to a friend.

How did Bellevue Place Education Trust start?

The organisation is a joint venture between two organisations who are passionate about providing high quality education provision. These two organisations bring together the very best of the fee-paying Independent sector – Bellevue Education Ltd – experienced in running a family of 15 independent schools in the UK and Switzerland; with a highly-regarded education consultancy - Place Group - with experience in the state sector for efficiency of supply in setting up new schools and converting academies, along with driving value for money and compliance.

Overview of BPET's Finance structure

BPET has a centralised financial structure, where the financial support that is traditionally provided at school level for Headteachers, is provided through the BPET Finance Team.

The Director of Finance liaises directly with the schools on all matters financial, with the Office Managers' responsible for raising purchase orders and creating new suppliers when commitments are made.

We have streamlined our finance systems across BPET, with one bank account and financial systems that support the recording and management of all BPET finances. BPET schools are cashless and weekly payment runs ensure prompt payment for all suppliers.

The Director of Finance as the appointed Chief Financial Officer for BPET, manages the BPET Finance Team. They are responsible for the probity of the BPET finances and delivery of this BPET Finance Manual. The role extends to being the financial point of contact for BPET schools for budget setting and monitoring.

The future of Bellevue Place Education Trust

BPET has a stated aim to grow to 15 primary schools across London and Maidenhead. After a period of consolidation and with positive OfSTED outcomes for all BPET schools, trustees feel we are in a position to consider responsible growth of BPET.

Our agreed approach is to work with OfSTED rated Good or Outstanding primary schools or academies within three miles of our existing schools, to create hubs of schools within a multi-academy trust. It is anticipated that the financial structure can manage with this proposed structure and any new schools will need support to be introduced/merged onto our existing systems.

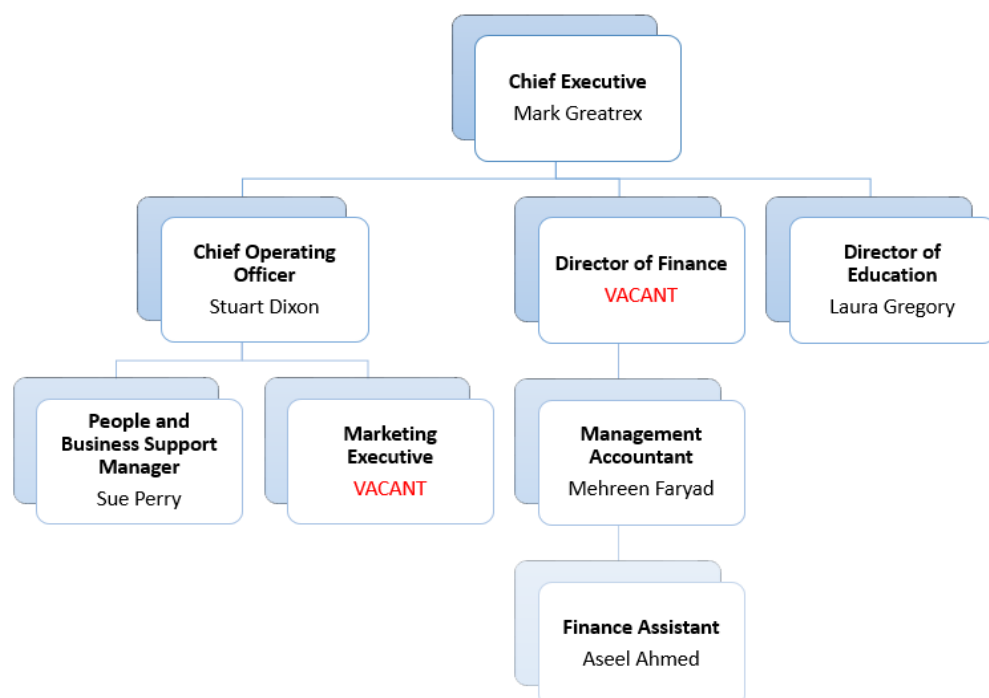
Leadership in the Bellevue Place Education Trust

The key purpose of the Director of Finance role is to provide overall responsibility for the strategic leadership of finance provision and be responsible for the flow of information to the Trustees, working closely with the Chief Executive, Senior Management Team, Headteachers and external partners.

The Director of Finance will be a member of the Senior Management Team (SMT) of the BPET Central Team. The SMT lead the development and practical application of long and short-term strategies to deliver the BPET 3 Year Strategic Plan.

The Director of Finance will lead the BPET Finance Team, delivering the financial processes throughout the academic year, while managing and mitigating risks. The relationship with the Chief Executive and Headteachers is key. Supporting and challenging their budgets, ensuring that they monitor expenditure, enabling them to make any adjustments in year, which maintaining strong financial probity exists across BPET.

Below is the BPET Central Team structure:



ADVERT - DIRECTOR OF FINANCE

Salary: Circa £60,000 - £65,000 p.a. (more for an exceptional candidate) plus pay award and performance reward (non-cash incentive) scheme

Arrangement: Full Time – 36 hours per week (including school holidays)

Location: Central London

This is an exciting opportunity to work with seven primary schools across London to make a real difference to the lives of young people we serve. We are seeking an enthusiastic and committed person to be our Director of Finance to work closely with the seven Headteachers to ensure that the budget and strong financial procedures are delivered.

With a centralised finance team, this role works directly with Headteachers to set and revise budgets, produce monthly budget monitoring, along with responsibility for the management accounts side of the Trust. This provides direct working on all financial aspects of the Trust.

To be successful in the role, the successful candidate will require strong interpersonal skills, along with the strong financial expertise. With an impressive track record of working at a senior level and experience of working with Headteachers is required and a commitment to help drive the delivery the BPET vision is key.

Reporting to the CEO, the Director of Finance has responsibility for the financial management of the Trust and for delivering on the Trust's financial strategy. This role is the designated Chief Financial Officer for BPET and sits on the Central Senior Management Team.

You will be joining a successful multi academy trust, where schools are strong educationally with all being judged as Good or Outstanding by OfSTED. Our financial systems are also very strong. Most recent audits, internal and external, have been approved with no outstanding recommendations. You will lead a strong, well-established finance team along with a strong network of Office Managers in the schools.

Download our application pack for full details of the role that includes the job description and person specification. For more information or a discussion about the role, contact Sue Perry at info@BPET.co.uk or please visit www.bpet.co.uk for more information.

Closing date for applications: **12.00 on Wednesday 23rd October 2019**. Interviews will take place on **Wednesday 30th October 2019**.

Bellevue Place Education Trust is committed to safeguarding and promoting the welfare of children and young people. References will be taken up for all shortlisted applicants, and successful candidates will be subject to enhanced DBS.

JOB DESCRIPTION	BELLEVUE PLACE EDUCATION TRUST
POST TITLE:	DIRECTOR OF FINANCE
SALARY:	Circa £60,000 - £65,000 p.a. (more for an exceptional candidate) plus pay award and performance reward (non-cash incentive) scheme
ARRANGEMENT:	Full time 36 hours per week including school holidays
REPORTS TO:	CHIEF EXECUTIVE
LINE MANAGEMENT:	CENTRAL FINANCE STAFF AND MONITORING OF SCHOOL OFFICE MANAGERS
MAIN PURPOSE:	The Finance Director will have overall responsibility for the organisation and management of finance across BPET, providing professional leadership and strategic direction and maintaining high standards. Accountable for systems, processes and procedures relating to budgeting and finance in line with the Board and Education and Skills Funding Agency (ESFA) requirements.

KEY PRIORITIES:

- To provide strategic vision / leadership on all aspects of financial management across BPET
- To undertake the role of Chief Financial Officer for BPET as defined in the ESFA Academies Financial Handbook.
- To be responsible for the full range of financial, budgeting and accounting procedures and practice in line with the ESFA's Academies Financial Handbook and Annual Accounting Direction.
- To establish and maintain outstanding professional relationships with internal and external stakeholders and to ensure effective communication across BPET.
- To work closely with the Accounting Officer (Chief Executive) to ensure compliance across BPET.
- To lead, manage, maintain and develop the finance systems across BPET in liaison with the Head Teachers, Board and Local Advisory Boards.
- To perform a key monitoring role as an attendee at BPET Board and Local Advisory Boards, ensuring that trustees, members and the executive team are fully informed of BPET and schools performance with financial KPIs.
- To provide BPET-wide management information and commentaries to enable decision-making.
- To identify efficiencies, value for money and procurement opportunities to ensure the best use of resources.
- To work closely with the Senior Management Team to provide support, training and guidance to the school's office managers and to line manage the finance team

RESPONSIBILITIES:

- Maintain the Finance and Accounting and Budgeting systems for BPET. Advise on developments required in order to improve efficiency.
- Manage the performance of the BPET Finance Team, establishing targets and monitoring.
- Prepare the Annual Central Team and School Budgets and 3-5 year plans in co-operation with the Headteachers and Chief Executive for presentation and approval by the BPET Board.

- Maintain a monthly overview of performance against budgets and report any exceptions to the Chief Executive and the BPET Board, including the committees.
- Monitor compliance with the BPET Scheme of Delegation and advise Headteachers, Chief Executive and the Board of any exceptions accordingly
- Manage the compliance, HMRC/tax, internal and external audit, banking, insurance, ESFA and other regulatory bodies as required. Lead with responses to these and external bodies in relation to finance as appropriate and advice from professional bodies.
- Produce and submit ESFA/DfE and other statutory returns as required, including the Annual Report and Financial Statements, Academies Accounts Return (AAR) and Budget Returns.
- Research and advise on developments with ESFA funding environment and any development of non-core income generation.
- Provide support, guidance challenge and information to Headteachers at a strategic level and advise them on longer-term financial plans, sustainability and ESFA requirements as appropriate.
- Advise on BPET staffing structures in relation to finance and business resources as BPET develops and grows. Identify and inform the Chief Executive and trustees of significant variances to budget, outlining reasons and options available for corrective action.

ADDITIONAL DUTIES

- A commitment to their own continuous professional development
- Undertake such other duties and responsibilities as may be reasonable requested.

DIRECTOR OF FINANCE PERSON SPECIFICATION

Criteria	Essential	Desirable
Qualifications/ Training:	<ul style="list-style-type: none"> • Financial qualifications required such as ACA, ACCA, CIMA or Member of AAT Level 4 	<ul style="list-style-type: none"> • IT related qualifications Qualified Accountant (CCAB)
Experience:	<ul style="list-style-type: none"> • 3 years post qualification experience • Experience in a school/Academy Trust or educational environment 	<ul style="list-style-type: none"> • experience of accounting for VAT and understanding of procurement rules and practices • experience of staff supervision • experience of Civica
Skills, knowledge and aptitudes	<ul style="list-style-type: none"> • Working knowledge of computerised finance systems and financial controls • Ability to interpret complex data and report and act on it • Excellent ICT skills • Excellent verbal and written communication skills appropriate to the need to communicate effectively with colleagues and other professionals. 	<ul style="list-style-type: none"> • Knowledge of Charities SORP • Knowledge of Academy funding

	<ul style="list-style-type: none"> • Ability and knowledge to produce budgetary estimates, reports, cash flow and financial and statistical summaries • Good working knowledge of principles and methods of financial control and reporting, and their adaptation to various purposes, including the preparation of financial accounts. 	
Other requirements	<ul style="list-style-type: none"> • Ability to work with initiative and to tight deadlines • able to constructively challenge self and others to continually improve own and team performance • Resilience under pressure • Good organisational skills • An understanding of the need to work in a confidential manner • Suitability to work with children • Committed to safeguarding and promoting the welfare of children and young people • Ability to relate to and promote the BPET vision and ethos • To be willing to undertake further professional development • Able to attend evening meetings if required 	<ul style="list-style-type: none"> • A genuine ambition and interest in improving the life choices for our young people and the wider community • Keen interest to develop the organisation with use of benchmarking and comparison data to inform strategic decisions.

TERMS AND CONDITIONS

Along with joining a successful and growing multi academy trust, all BPET employees benefit from a range of employment incentives that includes:

- Pension offer through either the Local Government Pension Scheme or the BPET Stakeholder pension (with Scottish Widows), which has a 2% employee contribution
- Annual pay award and performance reward (non-cash incentive) scheme. Following the completion of a performance reviews, rewards are linked to performance and would typically be within a range of 1%-6% pay award and a similar percentage arrangement for performance rewards.
- Travel loan
- Bike to work scheme
- 30 days' annual leave a year
- A deep commitment to professional development in the role, with all senior employees having a mentor.

Accountability:

- Accountable to the Chief Executive and, by extension, the BPET Board

Whole Trust role:

- Member of Senior Management Team of the BPET Central Team

Contract

- 36 hours per week is the stipulated contract period. It is anticipated that work may take more hours.

HOW TO APPLY/RECRUITMENT PROCESS

To apply, please forward a completed application form together with a letter (no more than two sides of A4) outlining your suitability for the role. Your letter should outline how you satisfy the qualification and experience elements of the Person Specification.

For candidates invited to interview, these responses will be explored further, together with the other elements of the Person Specification.

Please send your completed application by e-mail to info@BPET.co.uk. All applications will be acknowledged.

The Recruitment Process

We will treat all enquiries, formal and informal, in confidence.

Closing date for applications: **12.00 on Wednesday 23 October 2019**. Interviews will take place on **Wednesday 30 October 2019**.

Further information

Should you have any questions or would like a confidential conversation, then please contact Sue Perry at info@BPET.co.uk or call 020 3108 0375.

Bellevue Place Education Trust is committed to safeguarding children. The successful applicant will require an enhanced DBS check.