



stephen perse

foundation

Chief Financial & Operating Officer

CANDIDATE INFORMATION

Welcome from The Principal

Thank you for your interest in the role of Chief Financial and Operating Officer at the Stephen Perse Foundation. As Principal, it is my immense privilege to have been entrusted since 2020 with the leadership of our fantastic group of schools and nurseries situated in Cambridge, Madingley and Saffron Walden.

Our mission at Stephen Perse is to educate and inspire the contributors to tomorrow's world: intelligent young people with the creativity, confidence, compassion and conviction to question, evaluate and improve society. It is in support of that ambitious mission that we now seek to make this new appointment of Chief Financial and Operating Officer.

The successful candidate will be joining a highly successful organisation at an exciting and important stage in our development. Together with our Governing Body and a strong multi-disciplinary Executive leadership team, Heads of Sections and Heads of Schools, the CFOO will work closely with me to drive the Foundation forward and build on our well established local, national and international reputation.

Our preferred candidate will be a team player who has the qualities and experience to thrive in a dynamic working environment with significant regulatory, financial and operational complexities. They will be able to work collaboratively with the rest of the Executive, our Heads of Sections and the Senior Leadership teams in each of our settings, to provide insight and industry as well as support and challenge on the key priorities for the Foundation's day-to-day success, as well as its longer term development. We seek a bright, creative and visionary leader, with outstanding financial acumen, impeccable judgement, a first rate work ethic, and the ability to empower and develop others to ensure the continued success of the Foundation.

I hope that the information provided here excites your interest and provides a strong sense of the importance that we place on finding the right candidate for the Foundation in what we recognise as a pivotal role for the future. We would welcome applications from people with experience from all sectors, including industry, financial services and professional services, as well as those with a background in the education and charity sectors.

I look forward to meeting you through the recruitment process, and to sharing with you our vision for the future at Stephen Perse.

Richard Girvan
Principal



About Us

The Stephen Perse Foundation (SPF) is a family of leading independent co-educational schools in Cambridge, Madingley and Saffron Walden providing an outstanding educational experience for nearly 1,600 boys and girls aged 1 to 18. Founded in 1881 as the Perse School for Girls, the Stephen Perse Foundation has grown and developed since 2007, adding a co-educational sixth form to its highly successful and oversubscribed Senior School in 2008, and four nurseries and early years settings between 2010 and 2021. The Foundation has been fully co-educational since 2017 and now comprises four nurseries, two junior schools (ages 5 to 11) – the Fitzwilliam Building in Cambridge and Dame Bradbury's in Saffron Walden, the Senior School (ages 11 to 16) and Sixth Form in the heart of Cambridge. Predominately a day school throughout, there are currently 60 (mainly sixth form) boarders with scope to grow boarding numbers in future. The nurseries operate from 7.30am to 6pm Monday to Friday all year round.

The Schools' Founder, Stephen Perse, born in 1548, was an academic and philanthropist. He believed that education should be a right, rather than a privilege, accessible to those with ability and potential rather than dependent on income. The Foundation delivers programmes to help address inequalities of educational access and opportunity that exist in Cambridge and East Anglia. Building on his ethos and work, the Foundation has ambitious plans for the future, using its educational expertise and track record of sharing skills and resources to make a step change in tackling inequity. With ambitious plans for fundraising through the Charitable Foundation to support greater bursary provision, SPF will extend its contribution to reducing inequality in Cambridge and the wider East Anglian community over the coming years.

As well as its reputation for academic excellence, SPF is renowned for an innovative approach to education, preparing young people through its teaching, co-curricular and enrichment activities for life in an ever-changing, global, and digital world.

With excellence and creativity in teaching and learning at the core of its schools and nurseries, the Foundation values the positive difference that students can make in the world through:

- scholarship and the advancement of knowledge and understanding.
- kindness, courtesy, inclusivity and collaboration.
- diligence, independence and self-reliance.
- humility, reflectiveness and the pursuit of self improvement.
- character, individuality, wellbeing and confidence.
- conserving the environment and living sustainably.

As an Apple Distinguished School, the Stephen Perse Foundation is in the vanguard of the digital learning revolution, with students using iPads as virtual satchels and unlocking new ways to learn and collaborate. IT teaching, together with coding and computer programming is incorporated within the curriculum. Academic results at GCSE and A level are excellent. Most students take 10 GCSEs and in 2022, 79% of GCSEs were graded 9 to 7 and over 10% of the cohort achieved at least 9 grade 9s. At A level and IB, 83% of grades were A* to B (or IB equivalent) with students gaining places at some of the highest ranked universities, including six at Oxbridge and all seven medicine and veterinary medicine applicants achieving the grades required.

The Foundation has an extensive programme of community outreach including supporting core academic subjects at North Cambridge Academy. In a groundbreaking partnership with NCA and Cambridge based Costello Medical, this year the Foundation offered twelve 100% funded places in its Sixth Form to students from NCA.



Distinguished
School

Facilities

Each of the Foundation's schools has excellent teaching and learning spaces as well their own age specific dining facilities at each of their individual sites. Students at the Cambridge schools also benefit from the exceptional educational facilities and learning opportunities of being located in one of the world's leading educational and scientific hubs.

The Cambridge schools' facilities have benefitted from significant investment and redevelopment in the last three to four years as part of an overarching strategic masterplan facilitated by the Foundation's expansion. The Senior School has a new five storey building with a rooftop sports pitch (the first of its kind in Cambridge), a sports hall, activity space and viewing areas, 10 classrooms and an additional learning hub. With the Sixth Form moving to the former home of Cheshunt College (the oldest theological college in Cambridge) in Bateman Street, close to the Senior School site, this allowed remodelling of its former site, the Fitzwilliam Building, specifically for the Junior School which relocated there in January 2022. The former Junior School buildings, Rosedale House, have since undergone extensive refurbishment to expand and enhance the Sixth Form facilities to increase student capacity, adding further classrooms, social, outdoor and study spaces as well as a Sixth Form café.

The Foundation has its own five acre, all weather sports ground on Latham Road which provides tennis and hockey pitches as well as netball courts and facilities for touch rugby and cricket. The schools also use the cricket and football pitches at Gonville and Caius College sports ground and the indoor cricket facilities at Fenner's. Students also have access to the professional gym at Kelsey Kerridge sports centre. The Latham Road site also has a nature reserve which includes an eco-classroom. As the school has grown, the Foundation is looking to secure a long-term partnership with a local sports club to further enhance sports facilities.

The Senior School has a purpose-built music school and drama studio for class and small-scale productions as well as its main hall which transforms into a professional theatre for larger-scale performances. There is also a Visual Arts Centre which provides opportunities for fine art, digital art, textiles, film making, sculpting, pottery and printmaking.

The two boarding houses are located in the centre of Cambridge, a short walk or cycle to the Sixth Form campus. Each boarding house is mixed but boys and girls have separate and secure living areas and share social and study spaces. All rooms have en suite facilities.

Dame Bradbury's is in the centre of Saffron Walden, 15 miles to the south of Cambridge. It has a theatre and sports hall as well a mini-AstroTurf and sports fields. The school has an outdoor learning programme and Forest School status with access to local woodlands.



Governance

The Foundation's Governors have a wide range of experience and skills, along with an excellent understanding of the day-to-day operation of the schools. They act as the Trustees and Directors of the Foundation, determining its strategy and policies. There are currently 17 Governors but this can increase to a maximum of 20 including governors nominated by four Cambridge colleges, namely Girton, Gonville and Caius, Newnham and St John's although only the first two currently exercise such right. The Governors serve across a range of sub-committees that oversee the key elements of the Foundation's activities, including: Finance and General Purposes, Education, Buildings, Personnel and Employment, Investment, Risk Management and Remuneration. The Chief Financial and Operating Officer will work closely with the Clerk to the Governors to ensure the Board, its sub-committees and members have timely and effective information, as well as ensuring compliance with company and charity law and regulation.

The Stephen Perse Foundation is a Charitable Company limited by Guarantee. The company registration number is 6113565 and registered charity number is 1120608.

The schools are regularly inspected by the Independent Schools Inspectorate, and its various inspection reports (last undertaken in 2021) can be viewed [here](#).



Leadership Structure

The Foundation is led by the Principal, Richard Girvan, who has overarching responsibility for all activities of the Foundation. The Principal is supported by the Senior Executive Team which from September 2023 will comprise the Chief Financial and Operating Officer, the Head and Senior Deputy Head of the Senior School, the Heads of the two Junior Schools and Head of Nurseries and EYFS, the Director of Educational Strategy 5-11, and the Executive Director (Marketing, Admissions and Development). While each Head leads a senior team in their own school, HR, Finance, Admissions, Estates, Marketing, Facilities, Data, Compliance and IT are provided centrally with most support functions run largely from the Cambridge sites.



Finance

The financial health of the Foundation is strong, and the finances are well managed. The annual gross income (excluding investment gains) increased to £27m in 2022. The majority of the Foundation's income is derived from school fees and student extras; however, the Principal and the Governors are looking to diversify this through fundraising and commercial income generation and this work has already begun in earnest in recent years.

The Foundation restructured its borrowing in 2022, much of which was used to fund its expansion and deliver the strategic masterplan. Whilst the Governors are confident that the Foundation is well placed to meet its future obligations, ensuring that the ongoing financial strategy achieves this is imperative. It will require focus and discipline, particularly in light of the current and future political and economic risks to the independent education sector.

The Foundation's general bursary programme supports children and young people who have the qualities needed to benefit from the education that its schools provide, but whose parents or carers do not have the means to afford

the fees. This year, the Foundation is providing bursaries and scholarships to over 160 students to the value of c. £1.6m per year and is keen to increase this further in future years.

With the outstanding facilities available and their location, there is considerable scope to generate commercial income. With the level of commercial activity being impacted by the pandemic, it is a priority for the new CFOO to direct the work needed to rebuild this income stream.

School Community

The Stephen Perse Foundation Parents and Friends Association (PFA) has two roles: to provide a social framework and to raise funds for school projects which will benefit students. Dame Bradbury's has its own Parent-Teacher Association (PTA). Both associations regularly hold events at the schools with support from the Foundation's staff.

The Development office is currently working to overhaul and update the alumni database with a view to increasing alumni engagement in the years ahead.

The Role

The Chief Financial and Operating Officer (CFOO) will work closely with the Principal and the Governing Body to develop and deliver the Foundation's strategic vision. The CFOO is appointed by the Principal and the Board of Governors. The post-holder is accountable to the Principal and the Governing Body. They will attend meetings of the Governing Body and most sub-committee meetings, but will report on a day-to-day basis to the Principal.

Candidates will be able to demonstrate proven ability in senior leadership and financial control within complex organisations, managing people and resources effectively, delivering results, thinking strategically, and inspiring and motivating others. They will need to demonstrate high energy, the ability to think and communicate with clarity, with the facility to execute key initiatives that will drive the Foundation's success. This role requires a strong skill set in finance, strategic planning and execution, estate and facilities management. The successful applicant will demonstrate commercial acumen, strong entrepreneurial attributes, and the ability to lead and direct the Foundation's support operations including IT.

Although prior experience in the education sector is not a prerequisite, candidates must be able to demonstrate empathy with independent education and commitment to the Stephen Perse Foundation's mission, vision and values. This will include a strong 'moral compass', a genuine interest in education and a firm belief that diversity, inclusion and equality matters count.



Core Purpose

The CFOO is responsible for the effective leadership and management of the Foundation's finance, operations, non-educational compliance (including health & safety), estate, IT and data, sustainability and commercial activities including the effective application and management of resources. The aim is to ensure the smooth running of the Foundation to support the Principal and Governors in realising their vision for the Foundation's future. The CFOO also plays a key part in the strategic development of the Foundation and is responsible for developing and delivering the financial strategy to meet the Foundation's long term objectives.

Leadership & Management

This is a significant leadership position within the Executive Leadership Team of a large, complex and ambitious organisation. The successful candidate will possess the ability to offer insight and challenge on the key priorities for the Foundation's development.

The CFOO has overall responsibility for a diverse team of about 45 support staff (plus the staff engaged under the domestic and catering contracts), assisted by a group of highly capable line managers. The CFOO has direct line management responsibilities for the Finance Manager (a qualified accountant), Director of Operations (buildings, grounds, catering, domestic services) Director of IT and Systems Development, Head of Environmental Sustainability and the Health and Safety and Welfare Manager. The Head of HR and the Chief Compliance Officer are line managed by the Principal.

Key Responsibilities

Strategy

- In conjunction with the Governing Body, Principal and wider Executive Leadership Team, develop the long-term strategy to achieve the aims, vision and goals of the Foundation.
- Work in close partnership with the Principal and Executive Leadership Team to implement the vision and strategic plan, particularly in respect of finance, fundraising, business and support operations.
- Contribute actively to Foundation wide strategic decision-making.
- Contribute beyond the core functions of the CFOO's finance and operations brief as a business planner and commercial thinker, ensuring that the Foundation seizes commercial opportunities that the rapidly evolving external landscape present, educationally, politically and economically.
- Help strengthen the identity of the Foundation as inclusive schools and to deepen its links with external stakeholders, including the local community, alumni and parents.
- Provide to the Principal, the Executive Team and Governing Body adequate information to enable them to monitor performance against annual plans and strategic targets.

Leadership & Management

- Lead by example: be an inspiring leader of staff, bring out the best in them, and facilitate and encourage strong working relationships between the teaching and support staff.
- Build capacity and develop leadership at all levels within the support staff structure, championing an open and collegial organisational culture in which staff are empowered to take initiative and ownership, fostering a culture of excellence at all levels.
- Ensure that compliance, safeguarding and the welfare of students and staff inform and direct all decision making and that the Foundation continues to evolve its practice in line with changes to regulations.

Finance & Administration

- Responsible for managing the financial performance of the Foundation including maintaining a sustainable forward looking strategic financial plan.
- Advise the Principal and Governing Body on all matters relating to financial strategy, the impact of their decisions on the Foundation's financial and strategic position and commercial matters.
- Deliver financial results as agreed by the Board. Ensure effective finance and resource management.
- Direct and oversee all functional aspects of the Finance team, including the fees ledger, purchase ledger and payroll and the production of management accounts.
- Provide the Governing Body, Principal and Executive Leadership Team with appropriate regular, accurate and timely information about the Foundation's and their individual school's finances, including management accounts and cash flow forecasts, budget, and variance reports.

- Ensure the statutory accounts and audit are completed in an effective, efficient, and timely manner.
- Ensure that a robust system of internal controls is in place and operates effectively including fraud prevention and internal auditing.
- Analyse school fees and costs, including benchmarking and work with the Principal and Governing Body to set fee levels and provide insight into the schools' pricing strategies.
- Oversee the maintenance of the Asset Register.
- Ensure fair but robust debtor management, including meeting with parents when necessary.
- Oversee bursary applications, ensuring robust processes are in place for the financial assessment of parental contributions towards fees and make recommendations for awards to the Principal.
- Working with the Head of HR and the Principal, advise on remuneration and reward strategies.
- Advise the Governing Body on borrowing requirements, manage debt and ensure compliance with any covenants.
- Research, identify and advise the Principal on additional income, commercial and business opportunities including development of business cases and implementation strategies.
- Manage relationships with key external services, including the bank, auditors, and insurers.
- Manage effective procurement arrangements and review and negotiate tenders and contracts.
- Monitor the Foundation's investments, liaise with investment managers and provide information to the Investment Committee.
- Act as Company Secretary, and working with Clerk to the Governors, ensure the Foundation complies with all company and charity law.

Operations

- Maintain and develop an effective master plan for the Foundation's estate. Plan and deliver any future capital projects, including overseeing the work of external contractors.
- Ensure the efficient and effective running of all the following support operations:
 - ◇ estates/facilities including maintenance of all buildings, grounds and sports facilities
 - ◇ catering and domestic services
 - ◇ transport
 - ◇ site security
 - ◇ IT and Systems Development
 - ◇ commercial activities
- Ensure the Foundation's facilities are always well presented, serviceable, safe and compliant with regulations, including health and safety, fire and the Independent Schools Standards, liaising with expert external consultants as appropriate.
- Ensure the provision, delivery and development of IT infrastructure, data and services to support high-quality teaching and learning (including to deliver and maintain Apple Distinguished Schools status and as an Apple Regional Training Centre), and administration.
- Ensure all contracted out services provide value for money and meet the appropriate service requirements.
- Negotiate and manage energy and utility contracts.
- Ensure the development and delivery of the Foundation-wide sustainability plan and integrate sustainable practices across all operations.
- Maximise income from commercial activities, building on existing arrangements and exploiting new opportunities where possible.
- Work with the Foundation's professional advisors to ensure the provision of appropriate and timely advice.

Risk Management, Compliance and Health & Safety

- Drive the identification, assessment and management of business risk, including management of the risk assessment process and Risk Register.
- Contribute to critical incident planning and lead on business continuity and financial planning to ensure that the Foundation is well prepared for any crisis.
- Ensure that the Foundation has appropriate arrangements and funding in place to ensure compliance with all health and safety and regulations, promote a positive Health and Safety culture throughout the Foundation and chair the Health and Safety Committee.
- Ensure compliance with all applicable laws and regulations, including employment and disability law, and the relevant sections of the Independent Schools Standards.
- Ensure appropriate Data Protection policies and procedures are in place and champion their application throughout the Foundation.

Governance

- Uphold good governance and ethical behaviour.
- Manage and advise on internal governance policies.
- Attend and contribute to meetings of the Governing Body and sub-committees as required.

Wellbeing

- Encouraging participation, delegation, constructive feedback, mentoring and/or coaching.
- Motivating and supporting your staff to develop their performance and job satisfaction.

- Using leadership styles and practices that help to support the mental wellbeing of your staff.
- Discussing strategies to manage work-based pressure/stress or external pressures and involving others where appropriate.
- Identifying and responding with sensitivity to the emotional concerns of staff, and symptoms of mental health issues.
- Signposting a member of staff to sources of help and support within the Foundation's system where there are concerns for their mental health and wellbeing.

The list above is not exhaustive. Elements of this role description may be changed by the Principal and Governing Body from time to time, following regular reviews of progress and as the Foundation develops over time. The post-holder will be expected to comply with any reasonable request by the Principal or the Governing Body to undertake work of a similar level that is not specified in this role description.

Safeguarding & Welfare of Children

The post-holder's responsibility for promoting and safeguarding the welfare of children and young persons for whom they are responsible, or with whom they come into contact, will be to adhere to and ensure compliance with the Foundation's Safeguarding and Child Protection Policy Statement at all times. If, in the course of carrying out the duties of the post, the role-holder becomes aware of any actual or potential risks to the safety or welfare of children in the school, they must report any concerns to the School's Designated Person or the Foundation's Designated Safeguarding Lead.

All employees of the Foundation adhere to the Safer Working Practices guidance and all teaching staff are required to adhere to the Teaching Standards which can be found [here](#).

Person Specification

The successful candidate will bring the following qualifications, experience, skills and knowledge, leadership style and values.

Qualifications & Experience

- Educated to degree level or equivalent.
- A professional qualification in finance, estates, or project management (desirable but not essential).
- A strong track record of successful senior leadership experience in a complex organisation and working with a Board of Trustees or equivalent structure.
- Direct experience at senior level of both finance strategy and operations.
- Proven experience of leading and developing high performing multi-disciplinary teams with a clear commitment to the continuing professional development of all colleagues.
- Experience of some, if not all, of the following: project management, leading operational and systems change, estates management, oversight of new building projects, health and safety.
- Demonstrable financial and business flair, with the ability to produce long-term financial and business plans.
- Working within a regulatory framework.

Skills & Knowledge

- Strong strategic abilities and organisational skills with the capacity to guide whole organisational development.
- Financial literacy (budgeting, cost management, financial planning, and reporting) with strong analytical skills and the ability to present financial information clearly and concisely.
- Strategic financial management.

- First-class communication skills – able to balance robustness with constructive, positive discussion and diplomacy with the confidence and personal authority to represent the Foundation with a broad range of stakeholders.
- Strong interpersonal skills and high levels of emotional intelligence, with a proven ability to operate effectively and efficiently in a complex environment while maintaining a sense of humour.
- An in depth understanding of the commercial, economic, and financial imperatives in the leadership and management of schools.
- A clear and analytical thinker – willing to be flexible, solution-focused and willing to listen to others as well as take difficult decisions when necessary.
- A thorough understanding of the Foundation's responsibilities in relation to Safeguarding and Child Protection issues.

Leadership Style & Personal Attributes

- A highly visible leader who is able to work both independently and as a key team member, with energy and ambition to inspire and empower colleagues and wider stakeholders.
- Strong personal drive with the ability to lead others by example. High levels of self-awareness, humility and flexibility, as well as a transparent and collegial leadership style.
- Undisputed personal integrity, warmth, sound judgement and creativity.
- Dedicated and resilient, able to remain calm in a crisis.
- A deep commitment to the Foundation's mission, vision and values.
- Values and promotes diversity, equality and inclusion and a belief in the importance of social justice.





Appointment Terms

A highly attractive remuneration package is offered, reflecting the seniority and significance of the position. The salary offered will depend on skills and experience but is anticipated to be in the region of £110,000 - £120,000 per annum.

This is a full-time, 52 week post and some flexibility of working hours will be required in light of the role and responsibilities it entails.

The main benefits are likely to include:

- Annual holiday entitlement of 30 days plus statutory bank holidays
- A staff discount on School Fees of 50% should staff have a child/children at any school (from Reception Year upwards) within the Foundation
- Salary sacrifice tech and cycle to work schemes
- Season ticket loan/discount on train travel
- Contributory pension scheme – matching up to 10%
- Parking
- Private health and dental plan subscriptions

The Stephen Perse Foundation is an equal opportunities employer and is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment. All appointments for the Stephen Perse Foundation are subject to satisfactory reference and DBS (Disclosure and Barring Service) checks, proof of identity and eligibility to work in the UK, completion of a medical questionnaire and proof of qualifications.

Application Process

Interested candidates are invited to contact RSAcademics in the first instance, to arrange a confidential discussion with Nina Lambert, Head of Bursar Search: ninalambert@rsacademics.com.

Closing date: 10.00am on Tuesday 11 April 2023.

You should submit:

- A completed application form (available to download from www.rsacademics.com).
- A covering letter addressed to the Principal, Mr Richard Girvan. The letter should be a maximum of two pages and should explain your reasons for applying and outline your suitability for the role.

Applications should be made electronically to RSAcademics. To submit your application please upload your documents according to the instructions on the [RSAcademics website](http://www.rsacademics.com). If you have any questions about uploading your application documents, please contact Jonathan Barnes, Head of Operations, (Leadership Appointments), at applications@rsacademics.com. Jonathan can also be reached by calling our Head Office on +44 (0)1858 383163.

The process is as follows:

- All applications will be acknowledged by email. If you have not received acknowledgement that your application has been received within two working days of sending it, please contact our Head Office by telephone.
- Preliminary interviews will take place with RSAcademics via Microsoft Teams in the week commencing 17 April 2023.
- Longlist interviews will take place at the Foundation in Cambridge on Thursday 27 April 2023.
- Shortlist interviews will take place at the Foundation in Cambridge on Friday 5 May 2023.



Founded in 2002 by Russell Speirs, RSAcademics has advised and supported over 700 schools and educational organisations in the UK and worldwide. Through our working partnerships with heads, leadership teams, boards, staff and parents, we specialise in supporting schools in five main areas: strategy, marketing and research; equality, diversity and inclusion; operational improvement; leadership and governance and philanthropy. We enable schools worldwide to thrive, by finding and developing senior leaders, guiding decision makers, making connections and shaping debate. We are known for the calibre and spirit of our people. We exist entirely to serve schools because we believe that the world needs thriving schools. Please visit www.rsacademics.com for more information.

RSAcademics is committed to promoting diversity and inclusion in schools, and to safeguarding and promoting the welfare of children and young people.



Because the world needs schools to [thrive](http://www.rsacademics.com)