



Luckley
HOUSE SCHOOL

Director of Finance and Operations

Candidate Information



Welcome

Thank you for the interest you have shown in joining Luckley House School as Director of Finance and Operations.

Luckley House is a warm and welcoming boarding and day school. We are a community, small enough at 375 pupils for everyone to be seen, valued and counted but large enough to provide a wide variety of academic, sport and creative opportunities. Our uniqueness lies in the combination of our size, Christian ethos and flexibility to meet the needs of individual pupils and their families. We provide a distinctly academic education that is tailored to the individual needs of each pupil. This is offered in the context of a broad curriculum which celebrates the arts and sports as much as academic achievement.

In the role of Director of Finance and Operations, you will serve as a key member of the Leadership Team, helping to steer the School through our new development plan towards continued success. Our Governors are forward thinking and strategic in their outlook and keenly understand the distinctive roles of governance and the leadership of the executive. They are critical friends who have a deep and longstanding interest in seeing Luckley flourish and work hard to embed our Christian ethos in all decision making.

Luckley has grown considerably in the last three years. Our pupil roll has increased by 28%, and our facilities have seen considerable investment during this time, including the installation of an all-weather pitch, the refurbishment of the boarding house, the establishment of green areas, an upgraded music technology teaching space and, most recently, the purchase of five acres of adjoining land.

This is an exciting time to join our team, and we look forward to receiving your application.



Mrs Areti Bizior
Headmistress





About Luckley House

Luckley House is a co-educational, independent day and boarding school for pupils aged from 11 to 18 years. Situated on the southern outskirts of Wokingham, Berkshire, Luckley House is set in 20 acres of landscaped lawns and majestic woodland. The School has a Christian ethos with a mission and values which flow from this. The School's mission is to provide an outstanding education for boys and girls characterised by academic excellence, a rich and diverse range of opportunities, aspiration and enthusiasm for life and generosity of spirit. The School has strong traditions in music, drama, art, debating, community outreach and sport, and there are many co-curricular activities open to pupils to help them develop their talents to reach the highest possible standards.

Luckley House stems from the amalgamation in 1959 of two girls' schools, Luckley School, which was founded on the current site in 1918, and Oakfield House, which was established in the Lake District in 1895. The School changed its name to Luckley House School in 2013, and in 2015, boys were admitted for the first time. Numbers have increased by over 75% in 10 years, and boys now represent almost 50% of pupils. There are waiting lists for all years to which new pupils

are admitted; the School is close to its registered capacity of 380 and is considering an application to the Department of Education for approval to increase capacity to 420 pupils.

Most pupils live within a 15-mile radius of the School, and there is a good mix of pupils who join at Years 7, 9 and the Sixth Form from independent and maintained schools. There are currently 40 boarding places, and between 35 and 40 pupils board each weeknight, of whom around half are either from abroad or are weekly boarders.

The academic education at Luckley House is distinctly tailored to the individual needs of each pupil, and academic results at GCSE and A Level are well above the national average. Most pupils take nine GCSEs, and in 2023, 61% of GCSEs were graded 9 to 7. At A Level, 66% of grades were A*/A, with all those who applied achieving confirmed university places and circa 90% of pupils securing places at their first-choice university.

The School aims to welcome pupils from all faith backgrounds and none and with as diverse a range of backgrounds as possible, which enriches the school community and is vital in preparing pupils for today's world.

Location and Facilities

Just a few minutes' drive from the M4, A329 and A321 and with Wokingham, Ascot, Twyford, Farnborough and Fleet stations all on at least one of the 10 school-provided bus routes, Luckley House is an easy commute from the surrounding area.

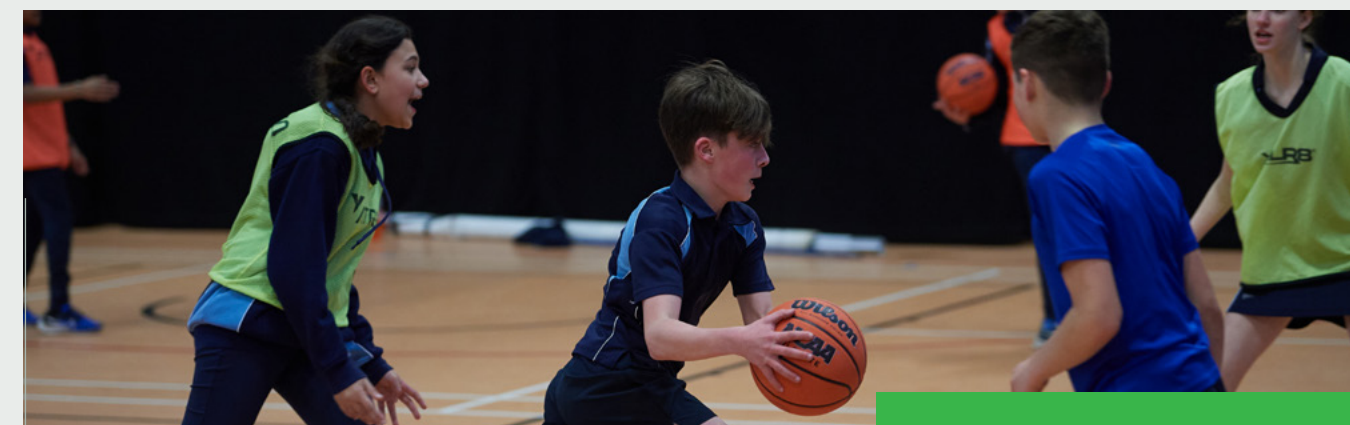
The facilities are superb for a school of its size and very well presented, including modern classrooms, spacious art studios, contemporary science laboratories, a well-stocked library and high-tech food, design and technology rooms. The original Edwardian House, known as Main House (Ernest Newton Building), is at the centre of the site. Reception, the Headmistress's Study, the Bursary and one of the two boarding houses are all within Main House. To the south of Main House and nestled on the edge of woodland is the Simon Richmond Music Centre. Opened in 2011, it comprises five fully equipped rehearsal/tuition rooms, a music technology suite, a recording studio and a performance hall.

To the west of the site is the Whitty Theatre. Opened in 2017, it is a beautifully designed 176-seat professional working theatre equipped with the latest technology in terms of lighting, sound, and AV systems together with a large foyer. Besides providing Luckley House pupils with the chance to perform and learn in a professional theatre environment, the Whitty Theatre also provides an entertainment space for the community, including productions and concerts by touring theatre companies, local dance and drama groups, film societies and music clubs.

The Sixth Form Centre has recently been refurbished to include social and study spaces, including a conservatory and kitchen. The main boarding house, Oak House, is on the first floor of the Sixth Form building. Both boarding houses have been refurbished to a high standard, and boarders typically share a room with one other.

The sports facilities are located to the south of the Whitty Theatre. The Sports Hall has courts for badminton, volleyball, basketball and netball, as well as a full-size climbing wall, sprung dance floor and wall mirror. There is also a functional training area and fitness suite. The on-site sports facilities were significantly enhanced by the opening of the flood-lit multi-use all-weather pitch in January 2022. The School also makes use of sports facilities at nearby Gorrick Woods, which include a 3G football pitch, a full-size hockey pitch and a synthetic cricket pitch.

The ten-year site-wide masterplan is currently being reviewed and will include an additional five acres of land adjoining the current site, which the School has recently acquired. Subject to planning permission and fundraising, this will allow Luckley House to expand the sports facilities to include a cricket oval and pavilion, athletics track and rugby pitch.



Governance

The Governors have a wide range of experience and skills along with an excellent understanding of the School's day-to-day operation. They act as the Trustees and Directors of the School, determining its strategy and policies. There are currently 13 Governors who serve across sub-committees that oversee the key elements of the School's activities, including Business, Education and Governance. The Director of Finance and Operations (DFO), as Clerk to the Governors, works to ensure the Board, its sub-committees and members have timely and effective information and analysis, as well as ensuring compliance with company and charity law and regulation.

Luckley House School Limited is a charitable company limited by guarantee. Company registration number: 1091938, registered charity number: 309099. The charity has a wholly owned non-charitable subsidiary, Luckley House Enterprises Limited, registration number: 04096768, through which the letting of facilities is managed.

The School is regularly inspected by the Independent Schools Inspectorate, and its various inspection reports (last undertaken in 2020) can be viewed [here](#). The DFO plays a key role in preparing for and managing processes for these ISI and other inspections and is also instrumental in ensuring that Governors are informed and involved as such inspections anticipate.

Leadership Structure

Luckley House is led by the Headmistress, Mrs Areti Bizior, who is supported by Core and Extended Leadership Teams.

Core Leadership Team

- Interim Bursar (to be replaced by the DFO)
- Senior Deputy Head and Designated Safeguarding Lead
- Deputy Head (Academic)
- Director of HR

Extended Leadership Team

- Director of Pupil Progress
- Director of Information Services
- Assistant Head (Curriculum Administration and Operations)
- Head of Marketing and Admissions

Finance

The School's financial position is sound, reflecting a full pupil roll, and the finances are closely managed. The annual gross income increased to £7M in 2023. The majority of the School's income is derived from school fees and pupil extras, but the Board of Governors is keen to explore the potential to increase commercial income generation, which is currently mainly derived from the letting of the sports and theatre facilities throughout the year and the wider site for residential camps in the school holidays.

As part of the School's commitment to broadening access, the bursary programme enables children to join the School whose families would not otherwise be able to afford the fees.



The Role

This is an exciting opportunity for a highly motivated, dynamic and commercially minded individual to join the Leadership Team of a warm and welcoming school that has achieved rapid pupil growth in recent years with further growth planned. The successful candidate will demonstrate a proven track record of successful business leadership with the ability to offer insight and challenge on the key priorities for future development whilst navigating the School through the commercial, economic and financial complexities independent schools are facing.

The DFO is responsible for the efficient and effective leadership and management of the School's governance, finance, buildings and facilities, health and safety, risk management, catering, grounds, housekeeping, transport, legal and commercial activities. The aim is to ensure the smooth running of the School to support the Headmistress and Governors in delivering the best possible outcomes for pupils whilst driving continuous improvement of the financial, estate and operational performance. The DFO also plays a key part in shaping and implementing the School's strategic development.

Candidates will be able to demonstrate a proven ability of leadership and financial control within multi-disciplinary organisations, managing people and resources effectively, delivering results, thinking strategically, and inspiring and

motivating others. They will need to demonstrate energy and agility, with the ability to build highly effective, collaborative working relationships at all levels. The new DFO will demonstrate a high level of financial and business acumen and strategic insight and will possess strong analytical and project management skills. Previous experience of the education sector would be of benefit but is not essential, and applications are welcomed from candidates with commercial, charitable and private sector backgrounds.

The DFO has overall responsibility for a diverse team of over 70 support staff, assisted by a group of highly capable line managers. The DFO has direct line management responsibilities for the Finance Manager (a qualified accountant), General Services Manager, Theatre Manager and Transport Supervisor.

Candidates must be able to demonstrate empathy with independent education and commitment to Luckley House's mission as a Christian foundation, its vision and ethos. This will include a genuine interest in education as well as personal behaviours which demonstrate integrity, respect and inclusivity.

The responsibilities outlined below are not exhaustive but are indicative of the requirements of this significant and wide-ranging role.



Key Responsibilities

STRATEGY

- In conjunction with the Board of Governors and the Headmistress, develop the long-term strategy to support the mission and achieve the vision and aims of the School.
- Work in close partnership with the Headmistress and the Leadership Team to implement the strategic plan, particularly in respect of finance and support operations.
- Lead the business and commercial planning, ensuring that the School seizes commercial opportunities that the rapidly evolving external landscape presents educationally, politically and economically.
- Lead on the development and delivery of the School's sustainability plan and integrate sustainable practices across all operations.
- Provide to the Board of Governors any information as required to enable them to analyse plans and proposals and monitor performance against agreed financial plans and strategic targets.

LEADERSHIP AND MANAGEMENT

- Lead by example: be an inspiring leader of staff school wide; motivate, coach and support them; facilitate and foster strong working relationships with and between all staff and create a strong customer focus, recognising the significance of internal as well as external customers.
- Ensure that the support operations are effectively staffed and resourced and have the appropriate skills.
- Work with the Director of HR to ensure effective management, mentoring, training, development and performance management of all support staff and volunteers.
- Contribute to the marketing and development of the School, including close liaison with the Head of Marketing and Admissions.

FINANCE

- Provide financial oversight of and direction on all financial matters.
- Advise the Headmistress and the Board of Governors on all matters relating to financial strategy to ensure the long-term sustainability of the School, the impact of their decisions on the School's financial position and commercial matters.
- Deliver financial results as agreed by the Board of Governors. Ensure effective finance and resource management.
- Provide the Headmistress and the Board of Governors with appropriate regular, accurate and timely information about the School's finances, including management accounts and cash flow forecasts, budget, and variance reports, including outside normal reporting timeframes as circumstances require.
- Advise the Headmistress and Board of Governors on financial and business policy, including investment management, tax, VAT, and benefits in kind, preparing feasibility studies for potential projects and operational change.
- 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.
- Ensure the invoicing and collection of all income, maintain an effective Fees in Advance scheme and fair but robust debtor management, including meeting with parents when necessary.
- Oversee arrangements for fundraising and regular giving programmes, working with the Development Manager as appropriate.

- Ensure robust processes are in place for the assessment of means-tested bursaries, make recommendations for awards and manage the scholarship and bursary funds with the Headmistress.
- Analyse school fees and costs, including benchmarking, and work with the Headmistress and Board of Governors to set fee levels and provide insight into the School's pricing strategies.
- Advise on remuneration and reward strategies.
- Oversee the administration of the payroll and pension schemes for all staff.
- Advise the Headmistress and Board of Governors on borrowing requirements, manage debt and ensure compliance with any covenants.
- Devise and implement efficiency and business improvement initiatives across the School and report progress against agreed performance targets.
- Manage relationships with key external services, including the bank, auditors, lawyers and insurers.
- Manage effective procurement arrangements and review and negotiate tenders and contracts to ensure best value and performance criteria are met.

ESTATES, CATERING AND HOUSEKEEPING

- Ensure effective and high standards of management, maintenance, cleaning and security of the School's buildings and grounds in conjunction with the General Services Manager.
- Ensure that buildings, grounds, facilities, furniture, and equipment are always well presented, serviceable, safe, and compliant with regulations, including health and safety, fire and the Independent Schools Standards.

- Ensure that a rolling programme for building maintenance and school facilities is planned, costed, and implemented on time, on budget and to the agreed quality.
- Plan, direct and manage the feasibility, design, specification, planning, and tendering of capital projects, ensuring their delivery on time, specification, and cost.
- Oversee the allocation and management of staff accommodation; ensure that the appropriate licences to occupy are in place.
- Negotiate and manage energy and utility contracts.
- Work with the General Services Manager to ensure high-quality provision of catering services.

TRANSPORT

- Working with the Transport Manager, ensure effective management of school transport, including maintenance of the School's vehicle fleet.
- Oversee arrangements for vehicular traffic to, from and within the site.

HEALTH AND SAFETY

- Ensure that the School has appropriate arrangements in place, including policies, procedures, equipment, training and funding to ensure compliance with all health and safety regulations, including all statutory testing.
- Fulfil executive responsibility for the health and safety arrangements throughout the School on a day-to-day basis, acting as the 'competent person' and monitoring to ensure compliance with policy.
- Promote a positive health and safety culture throughout the School.
- Chair the Health and Safety Committee.

IT

- Work with the Head and Director of Information Systems and Digital Strategy to develop and deliver IT infrastructure, data and services to support high-quality teaching and learning and administration.

GOVERNANCE, COMPLIANCE AND RISK MANAGEMENT

- Act as Company Secretary and Clerk to the Governors to ensure the School, any associated charities or trading subsidiaries comply with all company and charity laws.
- Ensure the efficient operation of the Board of Governors by providing the necessary information, arranging induction and training, visits, meetings, panels, preparing and distributing agendas, papers and minutes, and payment of expenses.
- Ensure Governors are updated on legislative and statutory changes.
- Maintain the register of Governors, skills, training and other records and support the Board in carrying out regular reviews.
- Ensure compliance with all applicable laws and regulations, ensuring policies and procedures are in place, and champion their application throughout the School, including acting as the School's Data Protection Officer.
- Ensure compliance with all aspects of employment law and the relevant sections of Keeping Children Safe in Education and the Independent Schools Standards Regulations, including the Single Central Register.
- As Compliance Officer, ensure the School's documentation is always ready for ISI inspection.

- Identify, assess and manage risk, including management of the risk assessment process and Risk Register.
- Ensure that the School has appropriate insurance cover for all key insurable risks.
- Lead on critical incident planning and lead on business continuity and financial planning to ensure that the School is well prepared for any crisis.

COMMERCIAL ACTIVITIES

- Maximise income from commercial activities, including from the sports facilities and theatre, building on existing arrangements and exploiting new opportunities where possible, consistent with the School's ethos.
- Ensure effective and appropriate management and operation of the commercial activities, including supervision and call-out arrangements commensurate with the facilities and services provided.

SAFEGUARDING AND WELFARE OF CHILDREN

Luckley House School is committed to safeguarding and promoting the welfare of children and expects all staff and volunteers to share this commitment. You will undertake your role and responsibilities in accordance with the Luckley House School Child Protection and Safeguarding Policy. The successful applicant will be required to have an enhanced DBS disclosure. The School's Child Protection and Safeguarding Policy can be found [here](#).

Person Specification

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

QUALIFICATIONS AND EXPERIENCE

- Educated to degree level or equivalent.
- A professional qualification in finance, estates, or project management (desirable but not essential).
- A track record of successful senior leadership experience of multi-disciplinary teams, including supporting/partnering with a Head or Managing Director.
- Direct experience of financial management and operational delivery.
- Experience in project management and contract negotiations and the ability to manage multiple projects organisation wide.
- Demonstrable financial and business acumen, with the ability to produce long-term financial and business plans.
- Working within a regulatory framework.

SKILLS AND KNOWLEDGE

- Strong strategic abilities and administrative and organisational skills with the capacity to guide whole-organisational development whilst maintaining direct operational responsibilities.
- Financial literacy (budgeting, cost management, financial planning, and reporting) with strong analytical skills and the ability to present financial information clearly and concisely.
- A highly accomplished communicator with strong interpersonal skills and a proven ability to operate effectively and efficiently in a diverse environment with a broad range of stakeholders.

- A working knowledge of company, charity, employment, health and safety and data protection law and best practice.
- An in-depth understanding of the commercial, economic and financial challenges in the leadership and management of independent charitable schools.
- Strong digital literacy: an understanding of the developing role of IT in education would be desirable.
- A clear and analytical thinker – willing to be flexible and solution focused and willing to listen to others, as well as take difficult decisions when necessary.
- An understanding of the School's responsibilities in relation to child protection and safeguarding issues and a clear commitment to delivering best practice in safeguarding.

LEADERSHIP STYLE AND PERSONAL ATTRIBUTES

- A highly visible and agile leader who is able to work both independently and as a key team member; delegate and build rapport, empower colleagues and gain the confidence of wider stakeholders.
- Commercially aware with a strong customer focus and a results-driven approach.
- High personal and professional standards; honest and with discretion and integrity.
- Highly motivated, ambitious, and positive.
- Calm, consistent and professional under pressure.
- Empathy with the Christian ethos of the School.
- Values and promotes equality, diversity and inclusion.





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.

This is a full-time, 52-week post, and some flexibility in 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.
- Discount on school fees if staff have a child/children at the School.
- Contributory pension scheme with a generous employer's contribution as well as a death-in-service benefit.
- Private medical insurance.

- Parking on site.
- Complimentary school meals in term time,
- Employee Assistance Programme.
- Use of the School's fitness suite.

Luckley House 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. The appointment is subject to satisfactory pre-employment checks in accordance with the relevant statutory guidance, including an enhanced Disclosure and Barring Service check, satisfactory references, proof of identity and qualifications and a satisfactory medical report.

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: 10:00 on Monday 11 March 2024

You should submit:

- A completed application form (available to download from www.rsacademics.com).
- A covering letter addressed to the Headmistress, Mrs Areti Bizior. 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. If you have any questions about uploading your application documents, please contact Khiloni Aplin at applications@rsacademics.com. Khiloni can also be reached by calling our Head Office on +44 (0)1858 383163.

The process is as follows:

- When you submit your application, you will receive an automated email from RSAcademics, confirming that we have received it. If you have not received the automated email within two working days of submitting your application, please email us at applications@rsacademics.com or contact us by telephone on 01858 383163.
- Preliminary interviews will take place with RSAcademics via Microsoft Teams on Thursday 14 and Friday 15 and March 2024
- Longlist interviews will take place at Luckley House on Friday 22 March 2024
- Shortlist interviews will take place at the School on Thursday 28 March 2024

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**

