



Sarah Perry, Business Director and Chief Financial Officer for the Diocese of Southwell and Nottingham MAT, and ISBL Fellow

Can you provide us with an example of your excellent practice in Finance, and tell us a little about your career development?

My experience has always been in education. Initially I was a lecturer at an FE college and then a Faculty Administrator at a Higher Education Institution prior to taking a career break to raise my family. After both my children had started school I returned to work part-time as a school secretary at a small primary school later moving to a full-time role in a larger primary school. While in this post I started a MBA in Education Management course at Lincoln University. This helped me to move into a more strategic role as a Bursar in secondary phase where I completed my MBA. The school in which I was working went through the stages of soft and hard federation with a couple of feeder primary schools giving me opportunities to develop my role and participate in the NCSL Demonstration Project at the same time as doing the ADSBM. With academisation, the Federation converted to a MAT and my role developed into that of Finance Director. I have subsequently moved to another developing MAT.

In my previous role, with the conversion to Academy status, my financial management responsibilities grew considerably. I was responsible for drafting the individual academy and consolidated whole Trust financial plans, the financial management regulations, scheme of delegation, value for money statement, risk register and business continuity plan, and was responsible for managing and monitoring a budget of over £6.5 million. The budget was around £8 million when there were four academies in the Trust until 31 August 2013. I also ensured that resources were used to best effect to support the Trust's development plan and that best value was obtained. I measured the Trust's financial performance by benchmarking, analysing and synthesising data to create reports to meet the needs of a variety of stakeholders including the Board of Directors. I have always prided myself on ensuring that financial processes and procedures are as efficient and effective as possible and was commended by the County Council Audit Manager on the quality of the documentation I provided for the Financial Management Standard in Schools submission in January 2007. I continue to be proud of the fact that the externally appointed Responsible Officer and the auditors have great difficulty in finding anything on which they can recommend improvement.

As Principal Financial Officer of that Trust, I ensured compliance with all legislation in respect of academy finances and that all reports and forms are submitted to the Education Funding Agency promptly. My financial responsibilities also included conducting tendering exercises for high value contracts and seeking additional resources and I was successful with three bids to the Academies Capital Maintenance Fund. Until April 2013 I also provided financial planning and budget monitoring support to another small local primary school outside the Trust.

Since applying for ISBL Fellowship, I changed my job (in February 2015) and am now the Business Director and Chief Financial Officer for the Diocese of Southwell and Nottingham MAT. This is a relatively young MAT, having only been formed in February 2014, but with the new government coming in in April 2015 it is anticipated that more schools will convert to academy status and join. The MAT includes academies widely spread across the Diocese and at the moment I spend 2 days in Newark and 3 days based in Southwell with regular visits to the academies based in Harworth and Sutton in Ashfield. In my current role I am responsible for devising the financial processes and procedures for the MAT and I mentor and support the SBMs in the primary academies in the MAT to ensure these academies are compliant. Strategic planning for the future development of the MAT as more schools convert and join is a key part of my role

What do you feel the ISBL Fellowship shows about you and your practice?

It is beneficial to have a body that recognises that I'm performing at a high level. Senior leaders don't necessarily understand what Business Directors do so it is helpful to be able to benchmark your expertise and the level at which you are performing in relation to others in similar roles, and to have the judgement that you are worthy of being awarded Fellowship made by a panel of experts that understand the requirements of the role.

What does Fellowship mean to you, your school and the wider sector?

The Fellowship is an accreditation of my work and provides recognition that I am doing a good job. It also provides evidence of this for others to see.

How does ISBL Fellowship support your professional development?

I think a lot of professional development is about demonstrating you have the necessary skills for the job and obtaining verification that I can do the job well. Being able to provide evidence for anything is so important and if I ever went for another role in the future this award would provide that.

What are the main benefits of Fellowship, and why do you think others should apply?

I have been a ISBL member for about 10 years. I feel the Fellowship provides evidence of my level of working, and is obviously awarded by people (a reference to ISBL and its Fellowship Assessment Panel members) who know what they are looking for. As well as the overall recognition of my work, it shows that one has a certain knowledge base, and an ability to work at a strategic level.

