



**Helix Academies Trust**

**CFO / SBM Application Pack**

*Dear potential applicant,*

*Thank you for your interest in joining Helix Academies Trust at this exciting stage of our journey. We are a growing trust with a clear vision: to provide exceptional education that enables every child to learn, belong, and thrive. Currently, we have two schools within the trust, and we have ambitious plans for expansion over the coming years.*

*We are seeking a Chief Financial Officer (CFO) who will play a pivotal role in shaping the financial future of our trust. This is a unique opportunity for an experienced and forward-thinking professional to join us at a formative stage and help build the systems and strategies that will underpin our growth.*

*In the short term, the role combines CFO responsibilities with those of School Business Manager at Marple Hall School. As the trust expands, these responsibilities will separate, and the CFO role will evolve into a strategic leadership position focused on trust-wide financial management and sustainability. This means you will not only manage current operations but also design and implement the financial frameworks that will support our future success.*

*We are looking for someone who shares our values and commitment to excellence, who can provide robust financial leadership and contribute to the wider strategic development of the trust. You will work closely with me and the Board, advising on financial strategy, compliance, and risk management, while ensuring that resources are used effectively to benefit our pupils and communities.*

*If you are passionate about education, excited by the challenge of building something new, and ready to make a lasting impact, we would love to hear from you.*

*Thank you for considering this opportunity. I look forward to receiving your application.*

*Warm regards,*



*Joe Barker*  
Chief Executive  
Helix Academies Trust

## **Chief Financial Officer (CFO) Job Advert**

### **Job Details: Chief Financial Officer of Helix Academies Trust and School Business Manager for Marple Hall**

**Salary: £64,000-£74,000, plus additional payment of £8000 whilst undertaking the additional Business Manager responsibilities**

**Start Date – 29<sup>th</sup> June 2025**

**Hours: 37 hours per week 52 weeks a year**

Are you a skilled financial leader looking for an exciting new challenge? Do you want to make a meaningful contribution to the education sector, working in a collaborative, supportive environment?

Helix Academies Trust is a new and growing Trust. Currently one secondary school and one primary school we are planning to expand over the upcoming few years.

We are seeking someone special who can be the Chief Financial Officer as we grow whilst also working as the School Business Manager at our secondary school in the short term. Our plans are that these will become two separate roles as the Trust expands.

We are looking for someone who shares our values, and who is committed to driving our trust forward.

As Chief Financial Officer, you will be responsible for managing the financial affairs of our trust, ensuring that our resources are used effectively and efficiently to support our schools and promote the success of all pupils. You will work closely with our Chief Executive contributing to our shared vision and values, and helping to shape the future of our trust.

Our focus is on finding the right person for the role, who shares our values and can make a positive contribution to our community-focused vision. We are looking for someone who has a proven track record of financial management in the Education sector.

You will have excellent analytical and problem-solving skills, with the ability to identify and mitigate risks and develop robust financial plans. You will lead, develop and maintain sound operations of financial and business practice across the Trust; and in doing so ensure that all requirements of the Academies Handbook are effectively fulfilled. You will also be an effective communicator, with the ability to build relationships with stakeholders at all levels, both within and outside the trust.

It is expected that the successful candidate will have proven knowledge of budget management and accounting systems, exceptional organisational, communication and IT

skills, the ability to work as part of a team and be diplomatic, self-reliant, self motivated and able to work with minimal supervision.

We are committed to providing a collaborative, supportive environment for our staff, with opportunities for professional development and career progression. If you are passionate about education and want to make a meaningful contribution to the success of our trust, then we want to hear from you.

To apply for this exciting opportunity, please submit your application form outlining your relevant skills and experience.

**Join our team at Helix Academies Trust and help us shape the future of education. If you require more information, please contact Gaynor Carpenter**  
[gaynor.carpenter@marplehall.stockport.sch.uk](mailto:gaynor.carpenter@marplehall.stockport.sch.uk)

The Trust is committed to safeguarding and promoting the welfare and safety of children and young people and expects all staff to share this commitment.

The successful candidate will be required to complete a Disclosure and Barring check in line with the Rehabilitation of Offenders Act (ROA) 1974 (Exceptions) Order 1975 and the Police Act Regulations. This post is covered by Part 7 of the Immigration Act (2016) and therefore the ability to speak fluent spoken English is an essential requirement for this role.

Closing date for applications: Thursday 29<sup>th</sup> January at midday

## **CFO (Helix Academies Trust) and School Business Manager (Marple Hall School)**

### **Job Description**

**Contract Type: Permanent**

**Reporting To: CEO**

**Responsible For: Finance Manager and Site Manager**

### **CFO**

#### **Main Purpose of the Role**

- Responsible for the financial development and sustainability of Helix Academies Trust and for the financial probity of the organisation
- Responsible for the financial development and sustainability of the Trust's finance and business functions, enabling the Trust to work effectively towards its aims
- To support the CEO in their role as the Trust's accounting officer

#### **Specific Responsibilities of the Role:**

##### **Strategic leadership and trust development**

The CFO will be accountable for supporting the trust's strategic development and aims through effective financial planning and management, in line with regulations.

The CFO will:

- Advise the CEO, board and other trust leaders on all matters relating to financial strategy and operations
- Contribute to the development and implementation of the trust's strategy, providing financial analysis and guidance on all activities, setting financial objectives and monitoring performance
- Conduct financial due diligence on schools applying to join the trust, and report to the board and other trust leaders with recommendations
- Contribute to the trust's risk management efforts, including identifying strategic and operational financial risks, taking steps to mitigate these risks, and maintaining the trust's risk register
- Develop, implement and monitor the trust's business plan, using effective financial and budget modelling and benchmarking to support strong decision-making

## **Financial management and control**

The CFO will be accountable for maintaining robust financial management of the trust and its academies.

The CFO will:

- Manage the budget process, from planning through to approval, working with other trust leaders
- Work with headteachers and/or business managers within the trust to prepare and monitor individual academies' budgets in line with school development plans and the trust's strategic objectives
- Provide accurate and timely information to the board and other trust leaders to enable effective budgetary control
- Develop, implement and monitor the trust's financial policies and procedures on procurement, virements, asset management and disposal etc in accordance with the Academies Financial Handbook, enabling robust financial management
- Take appropriate action to address financial risks, problems and irregularities
- Develop and maintain an effective internal audit procedure for the trust and its academies, including producing monthly management accounts and making recommendations for improvement.
- Manage the external audit procedures for the trust and its academies, and follow up on any recommendations resulting from audits
- Establish and monitor effective procurement procedures in order to achieve financial efficiencies, including overseeing the tendering process
- Oversee the trust's commercial contracts, ensuring they represent value for money
- Arrange and manage necessary insurance arrangements for the trust
- Manage the trust's tax and National Insurance arrangements, including ensuring claims for VAT and business rates are submitted and refunds are received and appropriately accounted for
- Manage the trust's cash position at all times, including overseeing bank deposits
- Support the income generation strategy for the trust and its academies

## **Reporting and compliance**

The CFO will be accountable for ensuring that the trust complies with its legal obligations, adheres to financial regulations, and submits accurate financial reports in a timely manner.

The CFO will:

- Complete and submit financial returns as required by the Department for Education, the Education and Skills Funding Agency, the Charities Commission and Companies House
- Prepare and submit the trust's financial returns and reports, including annual accounts and monthly management accounts

- Maintain the trust's accounts in line with the funding agreement and the Academies Financial Handbook
- Monitor developments to legislation around payroll, pensions and benefits, implementing changes and adapting processes as required
- Provide appropriate and timely reports to the trust board and other trust leaders to support effective leadership and governance

### **Leadership and management**

The CFO will be accountable for supporting the effective management of the trust and its academies, and for providing motivational leadership at all levels of the trust's organisation.

The CFO will:

- Take responsibility for the trust's financial management system including managing user access, providing training, considering future system developments and generating reports
- Manage the central finance team, academy business managers and other support staff roles, taking responsibility for their professional development and ensuring best practice is observed at all times
- Develop the trust's central finance services, ensuring these are fit for purpose and provide a high-quality service to individual schools, helping the Trust achieve continuous improvement
- Work with the CEO and central finance team to support the effective delivery of payroll services for the trust and its academies
- Develop effective relationships with the trust's stakeholders and partners in order to support its development and operation
- Act as a representative for the trust in external networks and forums, raising the profile of the trust, engaging with the wider sector, and ensuring that the trust is alert to information, changes and opportunities that could affect its work

**In addition to the role of CFO the successful candidate will also complete the key roles of the School Business Manager at Marple Hall School.**

### **Key roles and responsibilities**

- Setting and monitoring the MHS Budget, ensuring that viable spending plans are established, accurate accounts are maintained and the budget is monitored on a monthly basis
- Managing the MHS finance team, office staff and wider support staff including site management team and network support.

- MHS recruitment, HR and associated paperwork, working with senior colleagues to complete all aspects of the recruitment process in accordance with legislation and HR guidance
- Managing departmental budgets, overseeing invoicing and managing orders. Working with internal budget holders to ensure they maintain control of their allocated funds, secure value for money and that pupils and staff are provided with the materials and training that they need.
- Liaison with external agencies and suppliers, for example energy suppliers, contractors, LA partners, business leaders in other schools etc
- Contributing to SLT meetings and school development planning
- Parental liaison, specifically on matters relating to finance. Support the school pupil premium strategy
- SLT front of house, supervision and 'on-call' duties



## **About Our Trust**

### **Helix Academies Trust and Marple Hall School**

Helix Academies Trust opened in March 2025 and currently includes Marple Hall School and Romiley Primary School. The Trust is expanding within Stockport and the surrounding area.

Helix Academies Trust was designed as a forward-thinking and dynamic MAT, aiming to support and empower its schools while respecting their individual identities. Rather than creating identical academies, the Trust emphasises nurturing the unique character of each community it serves. Its mission focuses on helping learners to become confident, capable individuals who can influence, challenge and lead within their local communities.

Today, the Trust continues to grow steadily in the Stockport area and beyond, with its member schools working collaboratively to enrich the educational experience for all pupils.

This role, and the additional Business Manager responsibilities, is based at Marple Hall School. Marple Hall School is a high performing, over-subscribed and ambitious comprehensive school with 1600 students aged eleven to sixteen. We believe in the mantra that 'better never stops' and intend to become the most successful comprehensive school in the country.

### **Benefits of working for Helix Academies Trust**

In addition to the salary the successful candidate will be a member of the Local Government Pension Scheme with generous contributions from the Trust. All staff have access to a comprehensive wellbeing package offering support designed to support colleagues when it is needed the most. Staff can have access to the Childcare Voucher Scheme and the Cycle to Work Scheme.

The role is full year with 31 days annual leave plus bank holidays.