

JOB DESCRIPTION

POST:	CHIEF FINANCE & OPERATIONS OFFICER (CFOO)
ACCOUNTABLE TO:	CHIEF EXECUTIVE

MAIN PURPOSE OF THE ROLE:

The Chief Finance & Operations Officer will provide strategic and operational leadership across the Trust's core business services (including finance, procurement, ICT, estates, compliance, and risk) ensuring they are aligned with the Trust's Christian vision, strategic priorities, and commitment to excellence.

They will contribute to and lead the delivery of the Trust's strategic plan, working collaboratively with colleagues to translate vision into action and ensure sustainable, high quality operations that support school improvement.

The Chief Finance & Operations Officer will be responsible for ensuring all non-educational statutory and regulatory compliance obligations are met, including audit, financial reporting, data protection, risk management, and the requirements set out in the Academy Trust Handbook and Companies Act.

They will play a key role in shaping the future of the Trust, enabling strong governance, sound financial stewardship, and the effective use of resources across all academies.

KEY RESPONSIBILITIES:

1. STRATEGIC LEADERSHIP AND GOVERNANCE

- a. **Be an active member of the Executive Team**, working closely with the Chief Executive Officer to steer the long-term development of the Trust.
- b. **Contribute to the development, delivery and monitoring of the Trust's strategic plan**, ensuring business functions are aligned to our ambitions and values.
Provide high-quality professional advice to the CEO, Trust Board, Local Governing Bodies, and school leaders on matters relating to finance, estates, ICT, compliance, and governance.
- c. **Engage confidently with national and regional networks, forums and Trust partnerships**, ensuring our organisation remains connected, informed and outward facing.

- d. **Lead on the preparation and presentation of reports and analysis** for the Trust Board and its subcommittees, supporting strong and transparent governance.
- e. **Line manage Finance and administrative staff.** In partnership with school leaders, oversee the performance of academy-based Finance and Operations leaders, ensuring consistency and high standards across the Trust.

2. FINANCIAL PLANNING AND OVERSIGHT

- a. **Provide strategic oversight of all financial planning and budget management** across the Trust, including revenue and capital funding, ensuring alignment with our vision and educational goals.
- b. **Act as the Trust's Chief Financial Officer,** with responsibility for fulfilling all regulatory and statutory financial duties as set out by the DFE, Companies House, HMRC and other bodies.
- c. **Lead** delivery of:
 - Annual and multi-year Trust wide budget setting
 - Periodic reforecasting and resource planning
 - Timely, accurate, and compliant reporting
 - External audit and preparation of year-end statutory accounts
- d. **Ensure robust financial policies and procedures are in place,** understood, and consistently applied across all schools.
- e. **Monitor performance against budget,** ensuring value for money, financial sustainability, and effective stewardship of public funds.

3. PROCUREMENT AND CONTRACT MANAGEMENT

- a. **Lead on procurement strategy and contract oversight,** ensuring the Trust secures high quality services and achieves best value.
- b. **Oversee major tenders, framework arrangements and procurement activities** in line with public procurement regulations and the Academy Trust Handbook.
- c. **Work closely with legal advisers to safeguard the Trust's interests** in any contractual arrangements, including joint ventures, service-level agreements, and supplier relationships.
- d. **Ensure Related Party Transactions are appropriately managed** and transparently recorded.
- e. **Support Leads and school leaders in implementing and reviewing supplier KPIs** to ensure service quality and financial performance.

4. ESTATES AND INFRASTRUCTURE

- a. **Work with the Estates support to deliver a strategic estates plan** that supports school improvement and long term Trust development.

- b. **Ensure the Trust's premises are safe, well-maintained, and compliant with statutory requirements**, funding agreements, and lease conditions.
- c. **Lead on the planning and delivery of capital works and site development**, including the effective use of capital funding.
- d. **Support the development of local estate plans** that reflect the needs of each school, while ensuring alignment with the wider Trust strategy.

5. ICT AND DIGITAL STRATEGY

- a. **Develop and deliver a Trust wide digital and ICT strategy** that is secure, future-focused, and aligned with the Trust's educational and organisational priorities.
- b. **Ensure the effective implementation of this strategy** across all schools, supporting both operational efficiency and high-quality teaching and learning.
- c. **Work closely with the ICT support** to ensure infrastructure, systems and services are robust, scalable and fit for purpose.
- d. **Oversee the Trust's approach to data management, cyber security and digital safeguarding**, ensuring full compliance with data protection legislation and sector best practice.

6. COMPLIANCE AND RISK

- a. **Lead the development and implementation of the Trust's risk management strategy**.
- b. **Ensure strategic and operational risks are recorded, monitored, and reviewed regularly**, and that mitigations are in place and reported to the Audit & Risk Committee.
- c. **Ensure that each academy maintains and manages an operational risk register** that is aligned to the central framework.
- d. **Lead on data protection compliance**, ensuring policies, procedures and training are embedded across the Trust and that external DPO arrangements are well-managed.
- e. **Ensure compliance with the Companies Act, Academy Trust Handbook**, and all other relevant governance and reporting obligations.
- f. **Support the governance support to ensure records are accurately maintained** with GIAS and Companies House.

7. STATUTORY RESPONSIBILITIES

- a. **Uphold and promote the Trust's safeguarding, equality and inclusion policies** in all work and relationships.
- b. **Ensure all activities and functions under your leadership are compliant** with relevant legislation, policy and regulation.

8. ETHOS, EQUALITIES, AND HEALTH & SAFETY

- a. **Champion the Trust's Christian values** in all aspects of leadership and decision-making, ensuring that these values are reflected in the daily lives of pupils and staff alike.
- b. **Promote equality of opportunity**, ensuring that the Trust meets all its statutory obligations in relation to equalities legislation, and fosters an inclusive and supportive environment for all.
- c. **Ensure the health and safety of staff, pupils, and the public**, maintaining robust procedures to manage risks and promote wellbeing across the Trust.

This job description is a guide to the duties required and is not exhaustive. The duties may be amended from time to time, in consultation with the postholder, to reflect changing needs and circumstances.

PERSON SPECIFICATION

POST:	CHIEF FINANCE & OPERATIONS OFFICER (CFOO)
ACCOUNTABLE TO:	CHIEF EXECUTIVE

	Essential	Desirable
Personal Values		
Committed to actively promoting the Christian ethos and values of academies	√	
Committed to the vision and mission of the Diocese and of the Trust	√	
Qualifications		
Degree and/or recognised professional qualifications relevant to role	√	
Qualified Accountant (ACCA or equivalent)	√	
A record of recent and relevant continuing professional development	√	
Leadership & Management		
Experience of senior leadership and management in a successful institution	√	
Ability to plan strategically based on use of data, targets and benchmarking	√	
Experience of balancing strategic and operational dimensions of the role	√	
Experience leading staff	√	
Ability & Experience		
Experience of leading the strategic financial and operational planning for a school, academy or Trust	√	
Experience of budget setting and budgetary control	√	
Experience of financial management systems	√	
Experience of month end and year end procedures and processes	√	
Experience of Internal and External audit and their requirements	√	
Experience of working with school governors and our board of directors	√	
Knowledge of relevant financial policies and legislation including the Academies Financial Handbook	√	
Knowledge and accounting of VAT	√	
Experience of leading group procurement exercises	√	
Strong skills in financial analysis	√	

Experience in leading effective risk management, assessing and reporting on risk as appropriate		√
A solid understanding of and commitment to diversity and equality issues	√	
Confidence to apply both formal and informal styles where required	√	
Able to coach, develop and provide training for colleagues, building their skills and competence to manage and maximise their effectiveness and performance and that of their teams	√	
Personal Qualities and Skills		
Ability to articulate vision to a variety of audiences	√	
Advocacy, facilitation and negotiation skills	√	
Intellectually versatile, innovative, emotionally intelligent and perceptive	√	
Reliable and acts with integrity	√	
Demonstrates energy and dynamism, courage and resilience	√	
Positive approach to problem solving	√	
Excellent organisational, planning and time management skills, able to manage multiple tasks simultaneously without compromising on standards and quality together and with the ability to prioritise workload and work to deadlines	√	
Calm under pressure and self-motivated	√	
Creative and resourceful, with a "can-do" attitude	√	
A strategic thinker, able to see "the big picture" and provide strategic advice to the Executive Team	√	
A team-player, engendering a culture of openness and sharing	√	
Adept at building internal and external relationships and partnerships	√	
Literate and able to compose clear reports, correspondence and other documentation	√	
Strong IT skills	√	
Wider Knowledge and Understanding		
Understanding of current educational issues relating to academies	√	
Knowledge of relevant policies, legislation and codes of practice, as appropriate	√	
Additional Requirements		
A criminal record disclosure/DBS will be required prior to appointment	√	
May be required to work occasional evenings	√	
May be required to travel to schools within the Trust	√	
Excellent and unequivocal references	√	
Holder of a current driving licence and access to private transport		√