



Learning in  
Harmony  
Trust

# Candidate Pack

## Chief Finance Officer



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# WELCOME FROM OUR CEO

Dear Colleague,

Thank you for your interest in the role of Chief Finance Officer at Learning in Harmony Multi Academy Trust - this is a new post at a very exciting time in the development of our Trust.

LiHT is an established Multi Academy Trust (MAT) working across London and the East of England. The Trust was founded in 2014 and has been steadily growing over the past ten years. There are currently ten primary and two special schools, and the Trust is actively looking to extend its support to more schools. There is a strong 'presumption for partnership.' Each school in the Trust shares its challenges and benefits from access to a large network of expertise, ongoing support and high quality professional development, enabling them to provide students with exceptional opportunities both inside and outside of the classroom.

The Trust's ambition is to deliver the very best education for all students by maintaining high aspirations, and having a commitment to collaboration and innovation. At its heart there is a commitment to investing in people – strong teachers and staff make it possible for all students to thrive, impacting positively on our communities and society as a whole. There is a shared determination to serve all students, especially those who need it the most.

We are excited to share that we have recently had Regional Director approval for two further special schools, currently operating in Waltham Forest, to join us in early 2025. They will bring with them their strength in traded services such as outreach work, delivering foundation degree courses and supported internships for young people with SEND.

Our mission is to have the greatest possible impact on society by ensuring all our students, regardless of background or ability, leave our Trust equipped with the knowledge, skills and confidence they need to live a happy and successful life. Civic leadership is important to us, which is why we are committed to delivering excellence for our students, their families and the communities we serve. We place our relationships with each of our distinct communities at the heart of what we do – if our communities thrive, so will our students.



Gary Wilkie  
Chief Executive Officer

We utilise the expertise across our Trust and through our wider network of partnerships to impact positively on our schools and their communities. This includes providing outreach support and training, working collaboratively with schools outside of our Trust and ensuring our leaders play an active role in local steering groups and forums.

This post emerges from our growth and our recent centralisation of central business services. The new CFO role indicates the importance of strategic leadership of finance in the next phase of our work. The CFO remit is currently held by the Chief Operating Officer and Interim Finance Director.

Our work to redesign the central business services structure to date will assist you as the new CFO as we steer the organisation to a strong, scalable and sustainable future.

As our new CFO you will be a member of the Trust Leadership Group, comprising the CEO, Deputy CEO, COO and our Executive Heads. This group is accountable to the Trustee Board for the day to day strategic and operational oversight of the Trust.

We are keen to appoint a CFO that fits with our values and culture, and who can work in service of the school leaders to deliver the central business services vision, which is:

Central Business Services is a team of professionals providing high quality services across a broad range of specific domains. Our aim is to collaboratively work with our Trust's Leaders to ensure that we provide effective, efficient and professional support so that they can focus on the quality of education in our schools, ensuring that our Trust has an impact on pupil outcomes today, tomorrow and in twenty years time.

Your exact background and work history is less important than your personal skills and your desire and ability to work collaboratively in creating clear and actionable plans to help us strengthen and grow as a Trust. We want to find a colleague who will relish being part of, and strengthening the culture together, putting collaboration at the heart of everything.

If you are at all interested in finding out more about this role I'd actively encourage you to get in touch. You can book a 15 minute video meet with me using this [link](#).



# OUR VALUES

We live and breathe our values and focus on doing things the right way, providing the perfect environment for all our children to flourish and succeed and with a diverse range of schools in two contrasting locations, we offer a unique opportunity for professionals looking for a challenging and rewarding career in a supportive, creative and forward-thinking environment.



## **We Are A Nurturing Community**

We strongly believe that learners flourish when they are well looked after. This starts with our staff, because happy staff perform at their best.



## **We Act with Integrity**

We believe in doing things the right way. We are not a top-down organisation and effective collaboration is at the heart of what we do.



## **We Enable Success**

Strong relationships built on a foundation of trust and honesty, coupled with high aspirations for all our learners, enable us to strive for excellence.



## **We Encourage Innovation**

We ensure that our actions are always underpinned by the best available research and we provide a safe environment that encourages our staff to continue to learn and take risks in their practice and in our quest for excellence.

# OUR BENEFITS PACKAGE

We are proud to be a forward-thinking, progressive family of academies that places the wellbeing of our staff and pupils at the forefront of everything we do.

Our aim is to foster a culture of inclusivity that celebrates differences, promotes understanding, and ensures that no one is discriminated against in any way. By embracing diversity, we believe we can tap into the unique perspectives and talents of our employees, creating a more innovative and creative workforce that can better meet the needs of our pupils.



**Our non-contractual benefits package includes the following:**

We support flexible working arrangements, wherever possible.

There is a clear system in place for colleagues to request flexible working and, wherever possible, these are agreed to. These include: part-time working, job share, and parental leave.

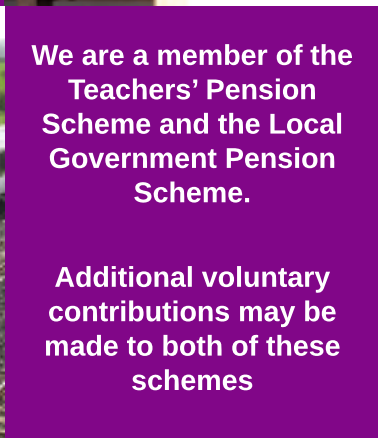


We subscribe to an Employee Assistance Programme to support colleagues by providing independent and confidential advice and support.



We are a member of the Teachers' Pension Scheme and the Local Government Pension Scheme.

Additional voluntary contributions may be made to both of these schemes



We adhere to cost of living increases adopted by the government for Teachers, and by the Joint Negotiating Council for Support Staff.

We can offer interest free season ticket loans and also operate a cycle to work scheme.



We subscribe to a reward scheme that provides discounts on a range of products and goods at high street retailers.



# HOW TO APPLY

We welcome potential candidates to reach out to arrange a telephone call and or a visit to one of our schools. If you are at all interested in finding out more about this role we actively encourage you to get in touch. You can book a 15 minute video meet with our CEO by using this link.

In order to apply for the position please follow [this link](#) to our online application portal.

Please complete the application and upload your personal statement, ensuring that you fully cover the points raised in the person specification.

## Shortlisting and Interviews

Applications close on Monday 25th November 2024 and shortlisted candidates will be contacted on Monday 2nd December.

Interviews are scheduled for Tuesday 10th and Wednesday 11th December and will be in person at Hartley Primary School. You will be advised in advance of the interview what you will need to prepare.

## Safeguarding Statement

Learning in Harmony Trust is committed to safeguarding and promoting the welfare of children, young people and vulnerable adults and expects all staff and volunteers to share this commitment. We follow safer recruitment practice and the successful applicant will need a satisfactory enhanced DBS certificate and supportive references.

## Disability Statement

We want all candidates to have the opportunity to participate fairly in the recruitment process and have the best possible experience. If you have a disability, long-term condition, or short-term impairment, please let us know so we can discuss how we might best support you to participate in the recruitment process.

If you are shortlisted for interview please share the following information:

- What barriers/difficulties you might experience during the interview process
- What you feel might reasonably remove or minimise those barriers/difficulties

We'll consider your request and confirm any reasonable adjustments that will be put in place to support you during the recruitment process.

Any information you provide about a disability or condition will remain confidential unless it is necessary to share this information to implement the adjustment. Please write to [HR@lihtrust.uk](mailto:HR@lihtrust.uk) using the subject line 'CFO interviews'



# JOB DESCRIPTION

## Salary

We are offering a competitive salary for this position.

## Job Purpose

The CFO is expected to provide strategic leadership to ensure the Trust's financial stability, operational effectiveness and compliance with regulatory requirements. The CFO is a key leader within the trust and a part of the Trust Leadership Group (TLG) alongside the CEO, Deputy CEO, COO and team of Executive Heads, working together with the Trustee Board to deliver the vision and strategy of the Trust.

## Line Management:

Finance Department, including Management Accountants, Senior Finance Officer and transactional finance officers.

## Liases with:

Chief Executive; Deputy CEO, TLG, Trust Board and Chair; Headteachers; Senior leaders in schools; Executive Business Leaders and external agencies and stakeholders, e.g. ESFA; colleague trusts and CFOs

## Key Responsibilities

### General

- Maintain a secure overview of the management of all financial issues within the Trust and within each of the individual schools.
- Ensure compliance with the requirements of The Academies Trust Handbook and stay abreast of the annual changes, amending our practice as appropriate.
- Ensure the financial sustainability of the Trust, making accurate long-term forecasts and putting in place programmes of change as appropriate.
- Advise the CEO and the Board on all matters relating to the financial strategy, on the impact of their decisions on the financial position of the Trust and on strategic matters, within the framework for financial control determined by the Board.
- Uphold good governance and ethical behaviour including good accounting practices in the finance function and to ensure the Trust upholds good accounting, reporting and internal control systems.
- Act as the lead point of reference for financial issues, as well as participating in the management of major academy projects, which may include potential growth, as required by the CEO.



# JOB DESCRIPTION - CONTINUED

- Prepare the consolidated financial statements in the statutory format specified by the ESFA, Companies Acts and Charity Commission for auditing by the external auditors. Ensure the audited statutory accounts are filed by 31st December.
- Prepare monthly management accounts and other ad hoc reporting as required.
- Monitor all control accounts and reports.
- Be a catalyst for driving efficiencies across the Trust – in spend across key categories such as utilities, consumables, insurances, external support contracts and other unfunded discretionary spends.
- Monitor all bank accounts and cash flow, establishing and managing a 'trust treasury' function to ensure that there is adequate cash flow to meet Trust requirements, taking advantage of interest bearing accounts where appropriate.
- Evaluate information, consult with, and report to, the CEO, Headteachers, and Trustees to prepare a realistic and balanced budget for the successful and sustainable achievement of strategic and operational functions at Trust and school level.
- Submit the proposed budget to the CEO and Trustees for approval and guide the overall financial planning process.
- Maintain a strategic financial plan including (a minimum) 3-year budget plan for the organisation.
- Contribute to risk management policies and procedures to safeguard the trust's assets and reputation.
- Notify the CEO and the Board (if the CEO is implicated) if fraudulent activities are suspected or uncovered.
- Receive, analyse and interpret financial reports, communicating findings in a simplified manner when necessary.
- Research additional funding, revenue/ income opportunities and additional business opportunities.
- Prepare appropriate bids or tender documents to acquire identified additional funds or grants.

## Leadership and Strategy

- Execute the duties of a senior strategic leader, modelling excellent leadership behaviours, in line with our Trust values.
- Perform other ad hoc duties and assignments as may be determined by the CEO.
- Attend Trust Board and relevant subcommittee meetings. Prepare accounts, papers and



# JOB DESCRIPTION - CONTINUED

presentations for these meetings as required.

- Negotiate and influence strategic decisions alongside other senior leaders to ensure financial propriety and best value principles are consistently applied.
- Plan and manage change in accordance with the Trust Strategic Plan.
- Lead and manage Finance support staff within the Trust.
- Liaise effectively with the COO, HR Director, IT Director and Premises and Estates Lead

## Compliance

- Liaise with external regulators such as the ESFA/DfE, Charity Commission, Companies House, external auditors and internal auditors as required.
- Develop and maintain the in-house Finance Handbook that sets out the Trust's operational procedures, combining best practice with the latest
- Act upon the Accounts Direction issued by the ESFA.
- Ensure all forms and returns required by the ESFA and the Trust Board are prepared and submitted in the formats specified by the ESFA/DfE and filed by the relevant filing deadline.
- Maintain effective systems of internal audit control.
- Review Trust policies, processes and procedures to ensure compliance with various external regulations including filing deadlines regarding VAT, PAYE, ESFA, DfE, HMRC, Charity Commission and Companies House.
- Ensure principles of best value are adhered to.

## Other

- To play a full part in the life of the Trust, to support our mission, vision and values, and to encourage staff and students to follow this example.
- To actively promote the Trust's policies.
- To pursue own personal professional development through training and networking.
- To comply with the Trust's Health and Safety Policy and undertake risk assessments as appropriate.
- To comply with the Trust's procedures concerning safeguarding and to ensure that training is accessed.

A flexible attitude to work is essential, the job description is a guide to our expectations of the role and is not an exhaustive or contractual list of requirements.

# PERSON SPECIFICATION

Please review the person specification carefully and ensure that you are able to provide the evidence required in the 'Evidence' column as part of your application.

Attributes	Expectation	Essential	Desirable	Evidence
<b>Qualifications</b>	Professional Accountancy qualification, e.g., ICAEW, CIMA, ACCA or CIPFA	x		Application / certificates
	Either Level 7 in Academy Financial and Operational Leadership, or Certificate in the Financial Reporting of Academies (CertFRA) or Masters in Business Administration		x	Application / certificates
<b>Professional Experience and Knowledge</b>	Experience gained in the education sector, ideally a MAT		x	Application form and supporting statement
	Senior resource management and strategic leadership experience, with accountability for complex resource base	x		Application form and supporting statement
	Proven track record of successful leadership and building effective teams	x		Application form and supporting statement
	Significant experience of leading and managing budgets; working with stakeholders to develop strong financial understanding across an organisation	x		Application form and supporting statement

Attributes	Expectation	Essential	Desirable	Evidence
<b>Professional Experience and Knowledge</b>	Experience of developing and managing external relationships with professional and regulatory bodies	x		Application form and supporting statement
	Evidence of entrepreneurialism and innovation, with an ability to identify commercial opportunities to maximise income	x		Application form and supporting statement
	Experience of working within an education setting or organisation.		x	Application form and supporting statement
	Experience of working with Governors, Trustees, or similar	x		Application form and supporting statement
	Experience in obtaining additional funding		x	Application form and supporting statement
	Detailed and up-to-date knowledge of accountancy and professional codes of practice evidenced by meeting CPD requirements	x		Application form and supporting statement
	Advanced knowledge of statutory requirements and funding strategy	x		Application form and supporting statement
	Knowledge and experience of managing procurement and contracts	x		Application form and supporting statement
	An understanding/experience of working with external	x		Application form and supporting statement

Attributes	Expectation	Essential	Desirable	Evidence
<b>Personal aptitude, qualities and skills</b>	Proficient in the use of MS Office applications and Financial Information Systems such as IMP and Xero	x		Areas to be explored if shortlisted for interview
	Proficient in the use of cloud based storage and communication systems (LiHT is a Google organisation)	x		Areas to be explored if shortlisted for interview
	Strong judgement and the ability to look at risk analysis through a commercial as well as a financial lens	x		Areas to be explored if shortlisted for interview
	Excellent analytical skills and sound judgement	x		Areas to be explored if shortlisted for interview
	Ability to interpret complex financial information, advice, and statutes and to devise policy/practice autonomously considering these	x		Areas to be explored if shortlisted for interview
	Ability to manage own workload without direction, having the ability to prioritise to meet tight deadlines	x		Areas to be explored if shortlisted for interview
	Highly effective communications skills and ability to influence and negotiate effectively	x		Areas to be explored if shortlisted for interview
	Ability to present complex information to a varied audience	x		Areas to be explored if shortlisted for interview
	High ethical standards, strong moral purpose and influencing skills with the ability to engage effectively with all staff across the Trust and Board of Trustees	x		Areas to be explored if shortlisted for interview

Attributes	Expectation	Essential	Desirable	Evidence
<b>Personal aptitude, qualities and skills</b>	Ability to persuade, motivate, negotiate and influence	x		Areas to be explored if shortlisted for interview
	Excellent written and presentation skills	x		Personal statement
	Comfortable and confident to represent both the Board of Trustees and CEO at external meetings and in the wider community, using initiative and discretion as required	x		Areas to be explored if shortlisted for interview
	Ability to work autonomously and flexibly	x		Areas to be explored if shortlisted for interview
	Ability to influence strategic decision making	x		Personal statement
	The jobholder may be required to apply resilience when dealing with emotions/challenges from staff, suppliers, and contractors on an infrequent basis	x		Areas to be explored if shortlisted for interview
	A personal commitment to lifelong learning and continuous professional development	x		Application form
	Commitment to high standards, best value, and continuous improvement	x		Personal Statement
	Ability to be reflective and self-critical	x		Personal statement Areas to be explored if shortlisted for interview
	Proactive and self-motivated	x		Personal statement Areas to be explored if shortlisted for interview
Resolution-focussed and problem solving	x		Personal statement Areas to be explored if shortlisted for interview	



The Learning in Harmony Trust is a charitable company limited by guarantee and registered in England and Wales with company number 09148738.

**Registered office:**

Learning in Harmony Trust, Hartley Primary School, Hartley Avenue, London E6 1NT

**Website:** [www.lihtrust.uk](http://www.lihtrust.uk)

**Careers Portal:** [learninginharmony.careers](http://learninginharmony.careers)



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**Social Media:** click to open

