

# Chief Financial Officer Candidate Recruitment Pack





*Jo Heard-Jones*

Welcome

Our Trust needs a new CFO!

We are seeking a colleague that will be exceptional in their role and will enable our children to excel because of their strategic thinking, drive, rigour and ambition.

We seek a wonderful unicorn, able to balance technical precision, meticulous and relentless high performance and robust effectiveness, while at the same time being kind, generous, sensitive, compassionate and a culture champion.

We have great people who need a brilliant leader to guide, motivate and authorise their excellence. #One team is everything and our pervading ethos; people thrive from the generosity of others.

At Shaw Education Trust, high achievement is at the heart of everything we do. We are committed to ensuring that no individual's opportunities are limited by their background or ability. Our focus is on harnessing the power of people to create positive change for our children and young adults, and we work closely with students, leaders, teachers, and support teams to shape everyone's best future—because one size fits one.

We believe education should be an exciting, dynamic space buzzing with vibrancy and potential. Innovation and entrepreneurialism fuel our passion, allowing us to be creative, agile, and responsive to context and circumstance. We embrace new ideas and challenge the status quo to ensure that our students thrive.

## **Collaboration Over Competition**

Far too often, education becomes competitive, combative, and driven by perverse incentives. At Shaw Education Trust, we do not believe it should be that way. We know that great strength comes from collaboration and working together. An excellent education, in a supportive and nurturing environment, is what every student attending one of our academies will experience.

Central to this is the support we provide to our staff teams. We invest heavily in their development, offering high-quality training and research-based opportunities that allow them to continually enhance their knowledge, practice, and expertise. As a result, our colleagues are motivated, highly valued, and incredibly driven professionals, and we are immensely proud of them.

## A Diverse and Supportive Learning Community

Our Trust is a rich and diverse learning community, made stronger by the mix of primary, secondary, and specialist academies, all with an equal voice. This structure allows us to draw from a wide range of valuable experience and knowledge, fostering collaborative opportunities that have proven impact. By working together, we ensure that each academy benefits from the collective strength and expertise within our Trust.

## Preparing for the Future

We value every day we have with our children and young people, recognising that our academies are just one step in their educational and life journey. We take seriously our responsibility to ensure that all students are equipped to take their next right step, whether that be further education, apprenticeships, or the world of work. To support this, we offer a wide range of opportunities to develop independence and prepare for life beyond school.

At Shaw Education Trust, the only thing that counts is the success of our learners, and we are committed to providing the tools, opportunities, and support needed to ensure they succeed.

## Join Us

We look forward to welcoming a new Chief Financial Officer who shares our values, vision, and passion for making a difference. The CFO will play a critical role in driving our financial strategy and ensuring the long-term sustainability of our Trust, all in support of delivering the best possible outcomes for our students.

Good Luck!

Jo

## About Shaw Education Trust

Shaw Education Trust is a dynamic and rapidly growing multi-academy trust committed to improving the lives of young people by providing exceptional educational opportunities. Established in 2014, we have quickly expanded and now oversee **32 academies** across the West Midlands and Northwest of England. Our academies include a diverse range of settings, including **primary, secondary, and specialist schools**, all of which work collaboratively to ensure that every student receives a high-quality education tailored to their needs. This diversity is a cornerstone of our approach, as we believe in the power of shared learning and the strength that comes from a united focus on excellence.

Since our inception, Shaw Education Trust has demonstrated a relentless commitment to driving educational improvement and ensuring that no student's future is limited by their background or ability.

Our Trust is built on the belief that "**one size fits one and being proud to be like nothing else**" meaning we tailor our approaches to meet the individual needs of each learner. This ethos has fuelled our mission of ensuring brilliance in education, offering innovative solutions to raise standards and deliver exceptional outcomes.

## **Financial Growth and Stability**

As of the current financial year, Shaw Education Trust operates with an annual turnover of approximately £150 million, reflecting the scale of our operations and the level of investment we make in delivering excellent educational experiences. We are a financially secure and forward-thinking organisation, with a robust financial strategy that supports both growth and sustainability. Our financial health enables us to invest in our academies, support staff development, and ensure that our students have access to the best possible resources and learning environments.

## **Finance Team**

The Trust's finance function is supported by a talented and dedicated team of **16 finance professionals**, who work across the central Trust and academies. This team is led by the Chief Financial Officer (CFO), who plays a pivotal role in ensuring financial stability, strategic financial planning, and compliance with regulatory frameworks. The finance team is responsible for managing all aspects of the Trust's financial operations, including budgeting, procurement, financial reporting, risk management, and supporting the delivery of payroll services. The team works closely with school leaders to ensure that each academy operates with financial efficiency while still achieving its educational objectives.

## **Our Vision and Values**

At Shaw Education Trust, our vision is to offer an excellent education to every child, regardless of their starting point. We are committed to fostering a collaborative culture where academies work together, share best practices, and continually improve. Central to our success is a belief in innovation, entrepreneurial thinking, and agility—qualities that enable us to respond effectively to challenges and ensure that our students are prepared for the future.

We are proud of the work we do and the difference we make in the lives of over **13,000 students** across our academies. Shaw Education Trust remains committed to expanding our reach, deepening our impact, and creating brighter futures for all.

## **Application Process**

At Shaw Education Trust, we are committed to appointing the very best candidate for this critical role.

As such, our application process is designed to be comprehensive and thorough, ensuring we identify the individual who will best support our mission of delivering educational excellence.

### **Initial Discussions**

We invite all suitable and interested candidates to discuss the role in the first instance with our Chief Executive Officer, Jo Heard-Jones. You can arrange a telephone conversation, or an in-person visit to explore the opportunity further. Additionally, if requested, a follow-up conversation can be arranged with our Deputy CEO, Kerry Inscker for further insights into the role.

To schedule an appointment, please contact Jenna Griffiths, Executive Assistant, at [jenna.griffiths@shaw-education.org.uk](mailto:jenna.griffiths@shaw-education.org.uk) or call 01782 948259.

### **Application Guidelines**

- Your application letter should be structured to reflect the key requirements outlined in the role description within this recruitment pack. Please provide relevant examples from your career that demonstrate why you are a suitable candidate for the position of CFO.
- All application documents must be submitted electronically in a single submission.
- Please ensure all fields are completed as part of the standard online application format.
- Additional documents such as a CV, supporting statement, or letter of application can also be uploaded as part of your submission.
- Be sure to include a minimum of two referees in your application. Referees will only be contacted if you are shortlisted and invited to interview, unless you specifically request otherwise. Due to the senior nature of this role, suitable referees should include senior executives and board directors.

We look forward to receiving your application and thank you for your interest in joining Shaw Education Trust as our new Chief Financial Officer.

Shaw Education Trust is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment, click here to review Safeguarding and Pupil Protection Policy <https://www.shaw-education.org.uk/our-trust/key-information>

This position is subject to appropriate vetting procedures including an online checks and criminal record check from the Disclosure and Barring Service (formerly CRB) which will require you to disclose details of all unspent and unfiltered spent reprimands, formal warnings, cautions and convictions. All shortlisted candidates will undergo an online search as part of Trust safer recruitment checks.

We are an Equal Opportunities employer and will ensure that all our recruitment and selection practices reflect this commitment.

**In accordance with our safer recruitment policy CV's alone will not be accepted.**

Successful candidates will be subject to a fully Enhanced DBS check along with other relevant employment checks.

<b>Job Title:</b>	<b>Chief Financial Officer</b>
<b>Band:</b>	<b>SPOT Salary</b>
<b>Salary:</b>	<b>Salary is expected of a Senior level Executive</b>
<b>Conditions of Service:</b>	<b>Trust Exec Contract</b>
<b>Location:</b>	<b>Kidsgrove</b>
<b>Report to:</b>	<b>CEO</b>

### **Job Purpose**

Shaw Education Trust is seeking an exceptional Chief Financial Officer (CFO) to lead and manage the financial strategy, sustainability, and development of our Trust. The CFO will be responsible for ensuring financial probity, delivering innovative financial leadership, and supporting the continuous improvement of our educational offering. Reporting directly to the CEO and working closely with the Board of Trustees, the CFO will be a key member of the executive leadership team, driving financial excellence and supporting the strategic vision of brilliance in education. The ideal candidate will be a qualified accountant with Executive board experience in either the commercial, public or charity sector.

## **Key Responsibilities**

### **Strategy**

- The CFO will be accountable for supporting the Trust's strategic development and aims through effective financial strategic planning and implementation management, in line with regulations.
- Advise the CEO, Board, and other Trust leaders on all matters relating to a financial strategy and associated operations, including internal and external audit.
- 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.
- 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 and high performance.
- Develop, implement and monitor the Trust's financial business plan, using effective financial and budget modelling and benchmarking to support strong and accurate decision-making.

### **Team leadership and staff development**

- The CFO will professionally and capably lead a team of finance experts to deliver high performance and excellent service to the central Trust and our Academies.
- The CFO will lead, motivate and inspire excellence across the finance teams, providing a strong and positive role model.
- The CFO will provide well targeted performance management and prioritise workforce development thereby ensuring staff teams are well trained, highly competent and proud to be held to account.

- The CFO will create a culture of optimism, positivity and ensure the psychological safety of the finance team and with all other related stakeholders.
- The CFO will ensure the finance teams engage effectively with all stakeholders and develop solution focussed thinking mindsets.
- Develop positive and effective relationships with the Trust's key stakeholders and partners 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

### **Compliance, monitoring and regulation**

- Conduct financial due diligence on schools applying to join the Trust, and report to the board and other Trust leaders with recommendations.
- Lead the Trust's financial risk management process, including identifying strategic and operational financial risks, taking robust and accurate steps to mitigate these risks, and maintaining this for the Trust, and making necessary reporting to the Trustees as required.
- Be accountable for maintaining and ensuring robust financial management of the Trust and its academies.
- Lead 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 Academy Trust Handbook, enabling robust financial leadership.
- Take appropriate action to address financial risks, problems and irregularities with rapidity and accuracy.
- Develop and maintain an effective internal audit procedure for the Trust and its academies, including producing audit reports and making recommendations for improvement.
- Lead the external audit procedures for the Trust and its academies and follow up on any recommendations resulting from audits.
- Ensure that the Trust's performance during external audit is strong with no major issues and all management actions are rapidly delivered.
- Establish and monitor effective procurement procedures in order to achieve financial efficiencies, including overseeing the tendering process.
- Oversee the Trust's commercial contracts and procurement processes, ensuring they represent value for money and align with ATH.
- Arrange and lead necessary insurance arrangements for the Trust.
- Lead 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.



- Lead on the Trust's cash position always, including overseeing bank deposits and investments.
- Support the income generation strategy for the Trust and its academies.
- 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.
- Complete and submit accurate 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 accurate annual accounts and precise monthly management accounts.
- Maintain the Trust's accounts in line with the funding agreement and the Academy Financial Trust 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.
- Take responsibility for deciding the Trust's financial management systems, managing user access, providing training, considering future system developments and generating timely and accurate reports.
- Work with the Deputy CEO, CPO, CIDO to support the effective delivery of payroll services for the Trust and its academies.
- Ensure the trust and its academies comply with all fiduciary responsibilities and achieve high standards.

### **Person Specification:**

Essential = (E)

Desirable = (D)

### **Education & Qualifications**

- Appropriately qualified with a relevant management-level qualification or affiliation from a recognised professional body, such as ICAEW, ACCA, CIMA, or CIPFA **(E)**
- Educated to degree level or with substantial equivalent work experience at board level **(E)**
- Evidence of recent professional development and a commitment to continuing development **(E)**

### **Knowledge & Understanding**

- Strong ability to think strategically and plan for long-term improvement **(E)**

- Comprehensive understanding of financial issues, working practices, and processes within an education setting **(E)**
- Sound knowledge of school-based financial and management information systems **(D)**

## **Experience**

- Proven experience of working at a senior leadership level within a financial capacity (E)
- Experience working within Education or a similar environment (D)
- Demonstrable strategic financial management experience across multiple sites, ideally spanning different phases of education (D)
- Significant experience in strategic leadership, including setting whole organisation goals and successfully managing teams to achieve objectives (E)
- Extensive experience of leading and managing multidisciplinary teams (E)
- Experience of managing and implementing a range of change projects across an organisation (E)
- Proven ability to deliver value-for-money solutions across all areas of an organisation (E)
- Experience of being held accountable for performance by senior directors and strategic leaders, delivering measurable organisational improvements (E)
- Experience in conducting business analysis and leading business improvement efforts (E)
- Expertise and understanding of risk management, particularly in relation to finance (E)
- Experience in specifying, procuring, and managing contracts and services (E)
- Experience managing contractors and third-party organisations to deliver services to agreed standards (E)
- Experience in managing human resources-related financial matters (E)
- Ability to make data-driven decisions and lead change, supported by strong communication skills (E)

## **Key Competencies**

- Ability to engage and inspire a wide variety of stakeholders (E)
- High levels of resilience and adaptability (E)
- Effective communicator with strong interpersonal skills (E)
- Action-oriented with a “can-do” attitude (E)
- Demonstrates strong self-awareness and emotional intelligence (E)

## **Skills & Attributes**

- An effective and inspirational leader who motivates others (E)
- High level of emotional intelligence and the ability to navigate complex interpersonal dynamics (E)

- Ability to lead change initiatives while ensuring all stakeholders are engaged and aligned (E)
- Ability to build and maintain effective relationships with leaders, external stakeholders, and partners (E)
- Excellent organisational skills with the ability to manage competing priorities, meet deadlines, and work well under pressure (E) Motivation & Personality
- Positive, optimistic outlook and attitude (E)
- Strong sense of accountability with a commitment to high standards (E)
- A good sense of humour and an approachable demeanour (E)
- Constant drive for improvement and excellence (E)
- A team player with a willingness to support and develop others (E)

### **Additional Requirements**

- Willingness to work flexibly within the scope of the role (E)
- Commitment to contributing to the wider ethos and mission of Shaw Education Trust (E)
- Ability to travel across the Trust's academies, with a full UK driving licence and access to a vehicle for business purposes (E)

## Why Join Shaw Education Trust?

At Shaw Education Trust, we are committed to providing you with a rewarding and enriching career that supports your professional and personal development. From day one, you'll be part of an organisation that values your individuality, fosters innovation, and promotes a culture of collaboration. Here's a glimpse of the fantastic benefits you can expect when you join our team:

### Culture

- **Collaborative Environment:** Experience an open and supportive working environment, not just within your own team but across the entire Trust. We actively encourage innovation and teamwork, empowering you to make a difference.
- **Inclusive Values:** Be part of a Trust that celebrates individuality and diversity, where everyone's contributions are valued.
- **Continuous Improvement:** Engage in dedicated focus groups that ensure we're constantly enhancing our working environment to meet the needs of all staff.

### Professional Development Opportunities

- **Ongoing Learning:** Access to Institute of Education (IOE) with regular training and a variety of internal and external programmes tailored to your career growth and learning needs.
- **Sponsorship:** Opportunities for professional development through external learning programmes (subject to application).
- **Career Progression:** We support your career progression across the Trust, with the flexibility to move roles for new challenges and growth opportunities.

### Financial Benefits

- **Competitive Salary:** We offer competitive salaries for both teaching and non-teaching staff, with the opportunity for annual pay progression based on performance.
- **Attractive Pension Plan:** Benefit from a highly attractive pension scheme, helping you plan for your future.
- **Salary Sacrifice:** Access to Electric Car Scheme, Medicash, Cycle to Work and many more.

- **Exclusive Discounts:** Enjoy a wide range of benefits and discounts specifically sourced for our staff.

## Wellbeing

- **Generous Leave Entitlement:** Full-time/Full Year Executives receive 33 days of annual leave plus bank holidays.
- **Wellbeing Commitment:** We are proud to work closely with all our colleague's developing department and academy wellbeing actions plans to support all our team's wellbeing.
- **Employee Assistance Programme:** Enjoy 24/7 access to a free, confidential Employee Assistance Programme offering advice and guidance on personal or work-related matters.
- **Personal Wellbeing Support:** Take advantage of courses on personal resilience and wellbeing to help you thrive.

At Shaw Education Trust, we are dedicated to fostering an environment where staff feel valued, supported, and motivated to reach their full potential. Join us, and become part of a Trust that places collaboration, innovation, and well-being at the heart of everything we do.

This is us....

## Our Values

At Shaw Education Trust, our values underpin everything we do. We are committed to:

- **Pupil and People-Centred:** We place the needs of our students and staff at the heart of our decision-making, fostering a nurturing and supportive environment where everyone can thrive.
- **Acting with Integrity:** Honesty, transparency, and ethical behaviour guide all our actions. We are committed to doing the right thing for our students, staff, and communities.
- **Being Innovative:** We encourage creativity and forward-thinking, constantly seeking new approaches to enhance teaching, learning, and school operations. Our entrepreneurial spirit drives us to explore innovative solutions that benefit our academies and students.
- **Best in Class:** We strive for excellence in everything we do, ensuring that our schools offer the highest standards of education, leadership, and service.
- **Accountability:** We take responsibility for our actions and decisions, ensuring that we deliver on our promises to our students, staff, and stakeholders.

## Why Shaw Education Trust?

As a forward-thinking trust, Shaw Education Trust offers numerous advantages to its academies, staff, and students:

- **Expert Central Services:** Our Trust provides expert centralised support in finance, HR, IT, and facilities management, allowing schools to focus on delivering high-quality education.
- **Innovative Recruitment and Retention:** We implement creative strategies to attract and retain top talent, ensuring our staff feel valued and supported in their professional growth.
- **Leadership Development:** We offer tailored leadership programmes, helping to fast-track the development of future leaders from within our Trust and promoting opportunities for career progression.
- **Financial Security:** Central reserves are managed to protect individual school budgets, ensuring financial stability and enabling continued investment in teaching and learning.
- **Collaboration Across Academies:** Senior leaders work closely across all schools in the Trust, fostering a culture of shared learning and continuous improvement.
- **Strategic Governance:** Our governance model is backed by leaders with a wealth of business and professional expertise, ensuring high standards and effective oversight.
- **Adaptability:** We maintain robust operational models that are flexible and responsive to changes in government policies and educational regulations.

At Shaw Education Trust, we are passionate about ensuring that every child and young person can succeed, and we are committed to providing the highest standards of education across all of our academies.

Act with  
integrity

Be best  
in class

Pupil &  
people  
centred

Be  
innovative

Be  
accountable



**Shaw  
Education  
Trust**



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