



The  
**Balcarras**  
**Trust**



**Applicant Pack**  
**Chief Financial and Operating Officer**



The Balcarras Trust came into existence on December 1<sup>st</sup> 2020. We are a Multi Academy Trust based in Gloucestershire. Prior to this the company (Balcarras School) was a Single Academy Trust.

## **The Mission Statement of The Balcarras Trust:**

The Balcarras Trust is committed to delivering outstanding inclusive, comprehensive education in each of its schools. Every child within the Trust will be expected, encouraged and supported to reach their full potential and, when they leave school, to be fully equipped to go on to be successful in the next phase of their lives.

The Trust will establish and maintain high standards of teaching, pastoral care and behaviour in its schools. No child will be “left behind.” There will be excellent opportunities for extra-curricular activities.

Each member of staff in the Trust’s schools will be an excellent role model and will play their part in ensuring that each school in the Trust will have its own special ethos. Students will feel proud of their school.

The Trustees will, at all times, uphold the highest standards of financial propriety and make efficient and appropriate use of the public money made available to them.

Underpinning all the activities in the Trust is the belief that, however strong the performance of the Trust’s schools may be, there is always room for improvement. Everyone associated with the Trust; the trustees, governors, school leaders, staff and pupils, shares this aspiration.

The Balcarras Trust is committed to its role as a ‘system leader’ in the wider educational environment. The Trust oversees the GLOW Maths Hub and the Balcarras Teaching School Hub, both of which are leading providers of Continuing Professional Development for educators.

## **The Work of the Trust**

### **Financial Scale of the Trust**

Next year the Trust’s income will be well over £20 million. We currently hold a reserve of over £1 million although that is likely to decrease this year. The Trust’s central services team is based at Balcarras and comprises 6 colleagues who cover all areas of financial management for example payroll, purchasing, invoicing etc. We anticipate that the team will need to grow and develop alongside the Trust over the coming years.







## Currently there are three schools in the Trust:

**Balcarras:** an 11-18 coeducational academy with 1432 pupils on roll. Consistently rated outstanding by Ofsted, the school secures superb outcomes at both GCSE and A level. In 2021 the school was awarded the Sunday Times Southwest State School of the Decade Award. The school is led by Dominic Burke (Headteacher) who combines this role with CEO of the Trust. Balcarras is the lead school in the GLOW Maths Hub and the Balcarras Teaching School Partnership. The Trust owns Balcarras' land which comprises 19.5 acres and buildings of some 11,000 square metres.

**The High School Leckhampton:** a brand new 11-16 coeducational comprehensive academy with an eventual capacity of 900. The school opened in September 2021 with an intake of 120 pupils initially operating on the Balcarras site before moving to its purpose built site at Farm Lane in Leckhampton. Next year the school will have a pupil population in excess of 700. The school achieved an 'outstanding' rating in its first OFSTED inspection in 2024. The High School Leckhampton is led by Helen Wood who is also Director of Education for the Trust. The site comprises 13 acres and buildings of some 7,000 square metres. The Trust has a 125-year lease on the site at Farm Lane.

**Winchcombe School:** an 11 to 16 school in the Cotswolds with 530 pupils on the roll. The school joined the Trust in November 2023 and is rated 'Good' by OFSTED. As a relatively small school Winchcombe prides itself on the quality of its pastoral care. In September 2025 Parin Gohil will take up the headship of the school. Winchcombe occupies a beautiful site in the Cotswolds which extends beyond 20 acres. The Trust owns the land and the buildings.

## In addition the Trust has a wider role as a system leader:

**Outreach work:** The Balcarras Trust is a leading provider of professional development for educators. The Trust runs the GLOW Maths Hub which is responsible for leading maths education in this region. GLOW has an annual turnover of close to £1 million. The Trust also has the contract to run the Teaching School Hub for Cheltenham, Stroud and The Cotswolds. This involves turnover of well over £250,000

The Trust also operate the Gloucestershire Initial Education Partnership, an 80 place teacher training programme, in conjunction with the Gloucestershire Association of Secondary School Leaders.

## Future Development

The Balcarras Trust is open to the possibility of growth although we don't seek growth for its own sake. We have very good relationships with a number of schools locally and we are open to the possibility that some of these schools might join the trust in the future.

In any case the Trust will grow as the current pupil number increases. This will require a larger central services team and a more extensive offer to our schools.





## Chief Financial and Operating Officer

<b>JOB TITLE:</b>	Chief Financial and Operating Officer
<b>HOURS:</b>	Full time. Some flexible working arrangements can be considered. Based primarily at Balcarras School but travel to other trust schools will be required.
<b>RESPONSIBLE TO:</b>	The CEO
<b>RESPONSIBLE FOR:</b>	The Trust's Central Service which includes finance, HR and operations.
<b>SALARY:</b>	Circa £80,000 plus benefits dependant on experience, access to local government scheme and annual leave.
<b>MAIN PURPOSE:</b>	The Chief Financial and Operating Officer will provide strategic management and leadership of the financial, business and key operations of the Trust. They will undertake the role of CFO as outlined in the Academy Trust Handbook and other relevant documents from the DfE.

## Chief Financial and Operating Job Description

### Financial Management

- ⇒ Act as the leader for all finance related work; this includes leading staff within the Trust employed with a finance function.
- ⇒ Undertake the role of Chief Finance Officer as outlined in the Academy Trust Handbook and any other relevant documents from the DfE ensuring that the Trust is compliant with all statutory and legal requirements.
- ⇒ Act as the leading point of reference for financial and commercial issues.
- ⇒ Provide strategic management and leadership of the financial and commercial operations and performance of the Trust.
- ⇒ Act as the point of reference for all academies within the Trust to establish the annual budgets for each academy, oversee the monitoring of expenditure and annual balancing of end of year accounts.
- ⇒ Provide visible leadership on all financial issues.
- ⇒ Represent the Trust at external meetings and events.
- ⇒ Produce monthly and annual accounts in accordance with the Companies Act 2006, UK accounting standards and DfE requirements, together with a detailed commentary on the result and on all significant variances from budget.
- ⇒ Work with the Chief Executive and leadership team of the Trust to develop and deliver the 3-year financial plan taking into account DfE guidelines/funding and identifying additional sources of external revenue and funding.

## Chief Financial and Operating Officer - General Job Description

### Financial Management continued

- ⇒ Prepare the annual budget in accordance with the requirements of the Trust and DfE.
- ⇒ Implement and operate rigorous and robust audits and controls.
- ⇒ Make appropriate arrangements for the external audit of accounts and liaison with auditors during their audit work.
- ⇒ Provide sound financial advice to the trustees, directors and senior management colleagues.
- ⇒ Ensure the appropriateness of the key assumptions included in the medium and long term financial plan and annual budget proposals.
- ⇒ Establish and maintain the academies financial and accounting systems and ensure the provision of financial information to the Academy management, Trust Board, local governing boards and external bodies as required.
- ⇒ Establish and maintain a risk register for the Trust to record risks and opportunities as they arise.
- ⇒ Prepare financial appraisals for new projects. This will include appraising the finances of any school which the Trust is considering admitting. The CFO will lead the process of 'due diligence' alongside the CEO.
- ⇒ Report on a timely basis to the DfE and other relevant bodies in line with their specific requirements.
- ⇒ Ensure that financial management within the Trust complies with the requirements of the Academy Trust Handbook and Academies Accounts Direction issued annually by the DfE which sets out the requirements for the preparation and audit of the annual reports and financial statements of the Trust.
- ⇒ Manage tax and VAT liabilities.
- ⇒ Ensure that appropriate internal control processes are in place, in accordance with DfE Funding Agreement to eliminate the risk of financial losses and to maximise economy and efficiency in the use of resources and enable accountability at appropriate levels.
- ⇒ Ensure the integrity of accounting for payroll transactions and that payroll reconciliations are properly executed.
- ⇒ Liaise with appropriate bodies in such areas as: legal, regulatory, approvals and accreditations.
- ⇒ Manage the Trust's financial position at a strategic and operational level with the framework of financial control.
- ⇒ Manage cash balances and cash flow maintaining appropriate banking arrangements.
- ⇒ Manage an ethical purchasing system to ensure value for money is obtained and to make best use of resources.
- ⇒ Keep abreast of financial developments across academies, including direction from the DfE and charity sector.
- ⇒ Understand the principles and practice of risk management.



## Chief Financial and Operating Officer - General Job Description

### Resource Management

- ⇒ Oversee the operational functions and systems of the Trust
- ⇒ Develop and lead the Trust's HR function.
- ⇒ Oversee the development of an HR Strategy for the Trust which ensures that we implement best practice in recruiting, developing, managing and supervising staff.
- ⇒ Establish, deliver and report on the impact of an effective HR operational plan for the Trust
- ⇒ Oversee the Estates Strategy and asset management plan, ensuring the effective management of the estate and best use of available funds.
- ⇒ Ensure compliance with legislative and policy requirements including those relating to health and safety.
- ⇒ Oversee effective and proactive communications strategies for the Trust and its schools.
- ⇒ Ensure that operational strategies align with the Trust's overall strategic objectives.
- ⇒ Develop and implement policies and systems to ensure efficient and effective operations and assurances across the Trust.

### Operations Management

- ⇒ Continue to ensure an appropriate and proportionate level and effective utilisation of reserves, in line with the Trust policy.
- ⇒ Create a culture of resource optimisation, promoting and embedding a culture founded on directing resources in line with the Trust Strategy.
- ⇒ Obtain best value by leading and monitoring a procurement strategy and activities, overseeing the contract award process.
- ⇒ Manage service contracts including maintaining the contracts register, renewal scheduling, leading on quality and change control and exit strategies.
- ⇒ Maximise income opportunities including the development of bid submissions and assessing return on investment (ROI).

*The job description sets out the main duties of the post. Such duties may vary from time to time without changing the general character of the post or level of responsibility. Such variations are a common occurrence and cannot of themselves justify a reconsideration of the grading of the post..*

## Person Specification

	ESSENTIAL/ DESIRABLE	EVIDENCED BY
Qualified to Degree Level	D	Application and Qualification check
Relevant Professional Qualification	E	Application and Qualification check
Significant experience of leading a financial operation	E	Application and Interview
Experience managing significant financial resources with good knowledge of regulatory framework	E	Application and Interview
Knowledge of financial processes and procedures	E	Application and Interview
Experience of managing a team	E	Application and Interview
In depth knowledge of the education sector	D	Application and Interview
Knowledge of different financial packages and tools and evidence of supporting others to use them effectively	E	Application and Interview
Excellent skills in strategic planning and management	E	Application and Interview
Strong analytical skills with the ability to evaluate complex information	E	Application and Interview
High level ICT , communication and inter-personal skills	E	Application and Interview
Strong commercial awareness	E	Application and Interview
An understanding of the principles and practice of risk management	E	Application and Interview
Able to identify with and actively promote the goals and commitment of the Trust	E	Application and Interview
Calm under pressure and able to reconcile conflicting priorities, has energy and is resilient	E	Application and Interview
Demonstrate a commitment to continuing professional development both for yourself and the team you lead	E	Application and Interview
Significant experience in Operations Management including HR.	E	Application and Interview
Proactive forward thinker	E	Application and Interview
Experience of estates and facilities management	E	Application and Interview



## How to apply

I hope having read through this document you are keen to apply. If so then please do the following:

- ◆ Fill in the standard Balcarras Trust Application Form which can be found on the Balcarras Trust website.

[Click here for the application form.](#)

- ◆ Please read the Recruitment Selection and Disclosure Policy.
- ◆ Write a supporting statement/letter of no more than two sides of A4 articulating why you are interested in this role and demonstrating why your experience make you a suitable candidate.
- ◆ The deadline for receiving applications is **Friday 27<sup>th</sup> June 2025, 9am.**
- ◆ Interviews will take place week beginning 30<sup>th</sup> June.

If you require any further information then please do get in touch. We are happy to speak to prospective candidates on the telephone or to arrange a visit. The best point of contact is my PA:

Karen Adkins

ksa@balcarras.gloucs.sch.uk 01242 545108.

We will agree a start date with the successful candidate dependent on their notice period.

I look forward to reading your application.

**Dominic Burke**

**Safeguarding:** The Balcarras 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. This role will involve regulated activity with children. We particularly welcome applications from underrepresented groups including ethnicity, gender, transgender, age, disability, sexual orientation or religion. Please also read the Recruitment Selection and Disclosure Policy within “How to apply” which includes our policy on recruiting ex-offenders. All posts are subject to an enhanced DBS check and receipt of two satisfactory references.

**Equalities:** The Balcarras Trust has a strong commitment to achieving equality of opportunity in its schools and in the employment of staff. The postholder will ensure that the Trust meets its statutory obligations in relation to all aspects of equality legislation.





## Selection Process

- ⇒ After the deadline for the position has passed there will be a shortlisting meeting with the CEO, Director of Education and Trustees to review the applications.
  - ⇒ Qualifications, experience and suitability for the post will be considered during the shortlisting process.
  - ⇒ Unsuccessful applications will be notified by email. Unsuccessful candidates can request feedback by email.
  - ⇒ Successful applicants will be invited for interview by telephone or email.
  - ⇒ References will be requested at this stage.
- Please stipulate clearly on your application form should you wish for your references not to be checked prior to job offer.**
- ⇒ A formal letter confirming the interview arrangements and plan for the day will then be emailed to candidates including details of documentation that will be required to be presented on the day.
  - ⇒ One of the requirements of the day will be to complete a “Declaration of Criminal Record and other information” check.
  - ⇒ If you have a DBS certificate from your current work place, you will be required to show this.
  - ⇒ Candidates will be required to undergo a formal interview (including safer recruitment questions) and where appropriate a task. All information concerning the day will be provided in the formal letter.
  - ⇒ Both successful and unsuccessful candidates will be notified by telephone where possible.

For all enquiries about this position please email [jobs@balcarras.gloucs.sch.uk](mailto:jobs@balcarras.gloucs.sch.uk)

<https://www.thebalcarrastrust.co.uk>