



# Spencer Academies Trust

## Candidate Information Pack

### Chief Financial & Operations Officer (CFOO)

#ASPIRATION #PARTNERSHIP #RESPONSIBILITY



# ASPIRATION  
PARTNERSHIP  
RESPONSIBILITY

# CHIEF EXECUTIVE

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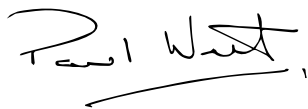
Thank you for your interest in this executive leadership role with Spencer Academies Trust (SAT). SAT is an educational charity, multi-academy trust and sponsor of academies. We educate approaching 19,000 children and young people in our academies and employ more than 2,800 teachers, leaders and educational support professionals across the East Midlands. We aspire to be a leading regional high performing trust with a national reputation for excellence.

We currently have 18 primary academies, 8 secondary academies and one primary-aged special school in our family of schools. All our schools share our values and beliefs and benefit from the collaboration and added value that being a member of our Trust offers.

Spencer Trust academies share an ambition to deliver results that compete with the very highest performing schools in the country and deliver a curriculum for students that is underpinned by breadth, opportunity and quality: one that seeks to give young people the opportunity to develop into well rounded global citizens that believe they can influence positive change in the world.

This post joins an established, dynamic and impactful executive leadership team and embodies our commitment to ensuring that every child can both thrive and succeed.

If you are excited by the prospect of delivering a financial strategy that transforms our Trust and providing strategic operational leadership to create improvements across all our operational services. If you feel you can meet the challenge and be an integral part of a successful and dynamic Trust, then we would like to hear from you.



Paul West,  
Chief Executive Officer, Spencer Academies Trust



**Paul West,**  
*Chief Executive Officer,  
Spencer Academies Trust*



# OUR TRUST

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## Mission

Our Mission is to deliver the best possible outcomes for children and young people.

## Vision

Spencer Academies Trust is an exceptional Trust, providing an outstanding education for local children.

# VALUES

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## Aspiration

We believe that every child deserves access to a high quality education in a caring and supporting environment. We actively encourage and challenge our students to have the highest possible aspirations for themselves and for each other.

## Partnership

We know that schools are stronger when they collaborate and work together in partnership, we believe that we are ONE Spencer and support each other through sharing ideas, goals and resources.

## Responsibility

We are committed to caring for and safeguarding our community and take seriously our role in delivering an exceptional education for our children and young people, and providing a supporting environment in which to learn and work.



# CHIEF FINANCIAL & OPERATIONS OFFICER (CFOO)

## The Role

We are looking for a visionary Chief Financial and Operations Officer (CFOO) to help shape the future of our Trust. This is an opportunity to make a strategic impact at executive level ensuring that the operational improvement services underpinning our schools are innovative, efficient, and aligned with delivering exceptional outcomes for all our children and young people.

As CFOO, you will lead the Trust's critical operational improvement functions taking responsibility for financial leadership and working with our operational improvement leads. If you're an experienced leader with vision, resilience, and a passion for making things better not just managing but transforming this could be your next challenge.

## TERMS AND CONDITIONS

Term	Permanent
Salary	Competitive Circa £110k
Benefits	LGPS, Private Medical Insurance and Wellbeing Benefits. <a href="http://www.spencertrust.org.uk/employee-benefits">www.spencertrust.org.uk/employee-benefits</a>
Hours	Full Time
Office Accommodation	The registered place of work will be Spencer Place, 16 Regan Way, Chilwell, Nottingham, NG9 6RZ
Right to work	The successful applicant will need to provide proof of the right to work in the UK before taking up the post.
Safeguarding	Spencer Academies Trust is committed to safeguarding and promoting the welfare of all our children and young people and we expect everyone to share this commitment. All appointments are subject to satisfactory pre-employment checks, including a satisfactory Enhanced DBS Check and completion of Level 2 Safeguarding training.

## JOB DESCRIPTION

Establishment:	Spencer Academies Trust Executive Leadership Team
Post Title:	Chief Financial and Operations Officer (CFOO)
Reporting to:	Chief Executive Officer

# PURPOSE OF ROLE

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Being a key member of the Executive Leadership Team the CFOO will be responsible developing and delivering a robust financial strategy for the Trust including responsibility for delivering strategic transformation of the Trust's financial health, financial planning, budgeting, analysis, risk management and operational improvement. Providing strategic advice, solutions and corrective actions to the CEO, Board of Directors and Principals on all financial and central service matters relating to the Trust.

Implementing a long-term strategic route map to ensure continued financial stability and clarity of leadership in relation to the provision of effective and efficient finance and operational improvement services that align with the strategic goals of our One Spencer Plan. Providing operational leadership and line management to create efficiencies across all operational improvement teams of our Trust.

Ensuring compliance with the appropriate regulatory frameworks and other relevant statutory requirements while fostering a culture that supports our mission and vision and ensuring that we continue to grow and thrive, providing the highest level of operational improvement for our academies and our children and young people.

Leading strategic decision-making to support our Trust expansion and future partnerships. Digital and business transformation supporting the CEO to manage major projects including academy conversions, capital investments and infrastructure developments.

Ensuring robust policies and procedures are in place across the Trust concerning key operational areas.

The CFOO will be the designated CFO as set out under the requirement of the Academy Trust Handbook.



# MAIN DUTIES AND RESPONSIBILITIES

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## Strategic Leadership

Working with the CEO, Executive Leadership Team and Operational Improvement Leads to:

- Create a culture of high performing teams, ensuring succession planning is in place at all levels. Ensure that effective communication and collaboration within and between education improvement and operational improvement enhances the value SAT brings to its Academies.
- Lead, oversee and develop the Operational Improvement Services, ensuring consistency, quality, effectiveness and cost-efficiency across Finance and Procurement, Compliance and Risk HR, ICT and Infrastructure and Estates & Facilities and Communications and Governance.
- Identify and implement process improvements and support structures across SAT to reflect sector best practice and ensure the best possible deployment of resources. Ensuring financial sustainability and alignment with educational priorities supporting excellence in education.
- Act as a representative of the Trust, liaising with stakeholders, auditors and regulators. Ensuring that our financial reporting and audit processes meet the highest standards and help maintain the Trust's reputation for transparency, integrity and accountability.
- Advise on the implications of Central and Local Government policies, academy trends and developments across the education sector and beyond. Ensure representation in national and local networks so that SAT is alert to new trends and is familiar with current best practice.
- Ensure that astute financial planning and management directly impacts on educational outcomes for our children and young people. Ensuring financial sustainability and alignment with educational priorities supporting excellence in education.
- Ensure our annual and medium-term business plans are robust and accurate, considering performance improvement objectives, funding projections, and other potential events and activities.

## Financial Leadership:

- Develop and implement financial strategies and policies creating a culture of financial transparency and operational efficiency that empowers our academy leaders.
- Develop internal control systems to ensure robust financial compliance and reporting. Oversee preparation of financial reports, including monthly, quarterly, and annual statements and ensure compliance with financial regulations and audit requirements.
- Oversee budget preparation, forecasts and funding requirements.
- Manage long term financial planning and sustainability such as financial modelling and securing new funding streams
- Present financial results and strategic recommendations to the CEO and Board of Directors.



- Oversee and manage all large procurement and tendering processes to achieve best value for money and drive operational efficiencies through improved procurement and resource allocation.
- Ensure the Trust achieves value for money across all their activities, including delivery of services.
- Liaise with internal and external auditors.
- Oversee the management of our outsourced payroll provider and pensions.

## Operational Management

Working with Operational Improvement Leads to design and implement business strategies, plans, and procedures to support organisational growth and efficiency. Monitor key performance indicators and operational metrics, ensuring continuous improvement. Optimize internal processes and workflows to enhance productivity and cost-effectiveness.

Have oversight of:

- **HR:** managing the Director of HR to ensure an effective approach to driving continuous improvement in all our people management strategies, HR operating systems and payroll, HR service delivery and policy development.
- **ICT:** managing the Director of ICT and Infrastructure to ensure an effective approach to all ICT operations across the Trust are robust and the data environment including cyber risk management and compliance with data protection legislation and best practice.
- **Estates and Facilities:** managing the Director of Estates and Facilities to ensure the estates and facilities management strategy provides improved learning environments for our children and young people that are sustainable and maintained. Health and Safety requirements are compliant with H&S law.
- **Operations, Communication and Governance:** managing the Senior Head of Operations and DPO to ensure compliance with corporate policy within the Trust by monitoring and reporting on matters relating to professional services, governance, compliance and risk management.

## Risk Management & Compliance

Working closely with the Executive Leadership Team lead on effective risk management to:

- Identify, assess, and mitigate financial and operational risks.
- Ensure robust internal controls and policies are in place and followed.
- Oversee insurance coverage, legal matters, and corporate governance responsibilities.
- Ensure a clear Risk Register and disaster recovery plan are in place across the Trust.
- Ensure that the appropriate insurance cover is in place across all Trust sites.

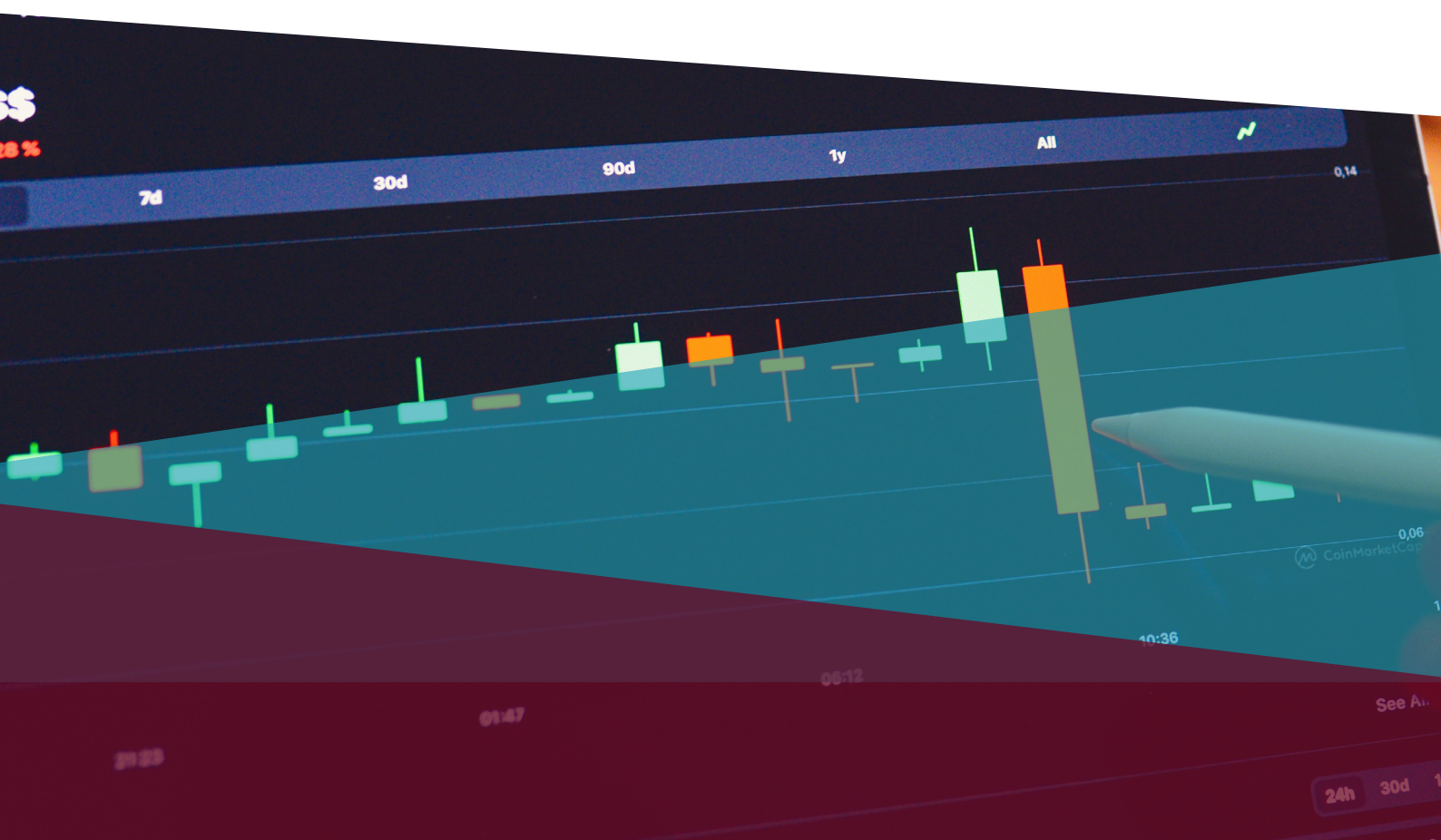


## Team Leadership

- Lead and develop the finance team and operations operational leads, fostering a high-performing and collaborative culture.
- Take responsibility for recruitment, induction and probation for colleagues under their line management. Undertake Professional Performance Reviews for colleagues the post-holder line manages and appropriately managed performance.
- Ensure professional development through mentoring, training, and through robust monitoring of our professional performance review processes and creating effective CPD opportunities.

## General

- The post holder will be expected to use all Trust standard computer hardware and software packages where appropriate.
- Work in a professional manner and with integrity and maintain confidentiality of records and information.
- Maintain up to date knowledge of national changes and legislation as appropriate to the role.
- Be aware of and comply with all Trust policies including the Employee Code of Conduct, IT, Health and Safety and Safeguarding.
- Participate in the Trust Professional Performance Review process and undertake professional development as required.
- Adhere to all internal and external deadlines.
- Contribute to the overall aims and ethos of the Spencer Academies Trust supporting its values of aspiration, partnership and responsibility, and establish constructive relationships with nominated Academies and other agencies as appropriate to the role.



# PERSON SPECIFICATION

Qualifications and Experience	E	D
Bachelor's degree in finance, Accounting, Business Administration, or related field (MBA/CPA preferred).	•	
Relevant qualifications, such as a degree in finance or accounting, and a professional accounting qualification (e.g., ACA, ACCA)	•	
Significant progressive leadership experience in financial and operational roles.	•	
Proven track record of managing financial strategies and operational systems in complex organizations.	•	
Strong knowledge of education sector finance, risk management, and strategic planning.	•	
Excellent leadership, communication, and problem-solving skills.	•	
Experience working with executive teams and boards.	•	

Knowledge and Skills	E	D
Strong financial acumen and analytical skills: Essential for analysing financial data, developing strategies, and managing risks.	•	
Leadership and communication skills: Required for leading the finance team, collaborating with other departments, and communicating financial information to stakeholders.	•	
Strategic thinking: Needed to develop and implement financial strategies that support the Trust's overall goals.	•	
Experience in financial planning and analysis, accounting, and risk management:	•	
Knowledge of relevant financial regulations and accounting standards: Ensuring compliance is a key aspect of the role.	•	
Experience in change management and academy conversions.	•	
Proficiency in relevant software and financial management systems: Essential for managing financial data and reporting.	•	
Hands-on, adaptable, and solution-oriented approach.	•	
Comfortable working in a fast-paced, evolving environment.	•	

Personal Qualities	E	D
Excellent interpersonal skills with the ability to maintain strict confidentiality	•	
Initiative and ability to prioritise own work and that of others to meet deadlines	•	
Efficient and meticulous in organisation	•	
Able to create direction and work in collaboration with the executive leadership team and operational leads	•	
Able to work flexibly, adopt a hands-on approach and respond to unplanned situations	•	
Ability to evaluate own development needs, those of others and to address them	•	
Commitment to the highest standards of child protection and safeguarding	•	
Recognition of the importance of personal responsibility for health and safety	•	
Commitment to the Trust's ethos, mission and vision of aspiration, partnership and responsibility.	•	

Safeguarding	E	D
A demonstrable commitment to supporting and promoting safeguarding, student welfare, equality and diversity.	•	
A thorough understanding of up-to-date safeguarding requirements and best practice.	•	

### The successful candidate will:

- have a strong track-record of successful transformation in their current role
- be a strategic thinker who can design and implement operational improvement systems alongside leading day-to-day service delivery
- be able to solve problems in a creative, resourceful and pragmatic way
- be a hardworking and dedicated leader who will drive performance and lead through collaboration
- be excited by the challenge of the unknown with the resilience to respond to the unexpected and the flexibility to be hands-on

If you feel you can meet the challenge and be part of a successful and dynamic Trust, then we would like to hear from you.



# HOW TO APPLY

Thank you for your interest in this exciting opportunity with our Trust. For more information, please refer to:

➤ [www.spencertrust.org.uk](http://www.spencertrust.org.uk)

Please email your CV and covering letter directly to Alison Smith, Director of HR:

✉ [asmith@spencertrust.org.uk](mailto:asmith@spencertrust.org.uk)

Your covering letter must set out the skills and relevant experience you have to meet the requirements of the role of Chief Financial and Operations Officer.

Please also include the names, addresses, phone numbers and email contact details of two professional referees who must be your current and previous employers.

Upon shortlisting for interviews, you will be asked to complete an application form for this position. In line with safer recruitment policies references will be called for prior to interview, unless specifically requested not to at this stage.

Early application is strongly encouraged as we reserve the right to interview and close the advert ahead of the closing date.

➤ [www.spencertrust.org.uk/vacancies](http://www.spencertrust.org.uk/vacancies)

If you have any questions regarding the role or would like an informal discussion with Paul West, Chief Executive please contact Alison Smith, Director of HR:

☎ 0115 646 4200

☎ 07966 881311

<b>Closing date:</b>	08:00, August 15, 2025
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<b>Interviews:</b>	TBC
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All expressions of interest will be acknowledged. Spencer Academies Trust is an equal opportunities employer.



## Disclosure & Barring Service

Spencer Academies Trust is committed to safeguarding and promoting the welfare of all our children and young people. Therefore, we expect everyone to share this commitment. All appointments are subject to satisfactory pre-employment checks, including a satisfactory Enhanced criminal records with Barred List Check through the Disclosure and Barring Service (DBS) and the completion of Level 2 Safeguarding training. It is an offence to apply for the role if an applicant is barred from engaging in regulated activity relevant to children (where the role involves this type of regulated activity).



# CONTACT INFORMATION

📍 **Spencer Academies Trust**  
Spencer Place  
16 Regan Way  
Chilwell  
Beeston  
NG9 6RZ

🚗 **SAT NAV: NG9 6RZ**

➔ [www.spencertrust.org.uk/](http://www.spencertrust.org.uk/)

✉ [info@spencertrust.org.uk/](mailto:info@spencertrust.org.uk/)

☎ [0115 646 4200](tel:01156464200)

✉ [@satrust\\_](https://twitter.com/satrust)

📷 [spenceracademies](https://www.instagram.com/spenceracademies)



# SPENCER


ACADEMIES TRUST

**Registered Office**

Spencer Academies Trust  
Spencer Place  
16 Regan Way  
Chilwell  
Beeston  
NG9 6RZ

 [spencertrust.org.uk](http://spencertrust.org.uk)

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 0115 646 4200

 @satrust\_

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