



ST CARLO
CATHOLIC ACADEMY TRUST
Guided by faith | Serving with generosity | Learning for life

St Carlo Catholic Academy Trust (SCCAT)

CFO Person Specification

Chief Finance Officer Person Specification

1. Qualifications & Professional Status

Essential:

- Degree or equivalent qualification in finance, accounting, or related field
- Evidence of continuing professional development (CPD)

Desirable:

- Fully qualified accountant (e.g. ACA, ACCA, CIMA, CIPFA)
- Postgraduate qualification (MBA or equivalent)
- Relevant education sector finance qualification

2. Experience

Essential:

- Significant senior financial leadership experience (e.g. Finance Director, CFO, Head of Finance)
- Proven track record of strategic financial planning and budget management
- Experience of leading and developing finance teams
- Experience managing large, complex budgets (ideally multi-site or group structures)
- Demonstrable experience of financial governance, audit, and risk management

Desirable:

- Experience within the education sector (schools, academies, or public sector)
- Experience working within a Multi-Academy Trust or similar organisation
- Experience of capital project financial management
- Experience dealing with funding bodies or regulators

3. Knowledge & Understanding

Essential:

- Strong knowledge of financial regulations, compliance, and reporting standards
- Understanding of strategic financial management and resource allocation
- Knowledge of risk management frameworks and internal controls
- Understanding of payroll, pensions, and procurement processes

Desirable:

- Knowledge of academy trust financial frameworks (e.g. Academies Trust Handbook)
- Understanding of public sector funding and accountability
- Awareness of education sector challenges and funding pressures

4. Skills & Competencies

Strategic Leadership

- Ability to contribute to overall organisational strategy at executive level
- Strong commercial and financial acumen
- Ability to align financial strategy with educational priorities

Financial Management

- Advanced budgeting, forecasting, and financial modelling skills
- Ability to present complex financial information clearly to non-financial stakeholders
- Strong analytical and problem-solving skills

Communication & Influence

- Excellent interpersonal and communication skills
- Ability to influence senior leaders, trustees, and stakeholders
- Skilled in presenting to boards and audit committees

Management & Team Leadership

- Proven ability to lead, motivate, and develop high-performing teams
- Experience managing change and driving improvement

Governance & Compliance

- Strong understanding of audit processes and regulatory compliance
- Ability to ensure robust financial controls and accountability

5. Personal Attributes

- High level of integrity and ethical standards
- Strong attention to detail with a strategic mindset
- Resilient and adaptable in a complex, changing environment
- Collaborative and team-oriented approach
- Commitment to the values and mission of education and public service

6. Other Requirements

Essential:

- Commitment to safeguarding and promoting the welfare of children
- Willingness to undergo appropriate safeguarding checks (e.g. DBS)
- Flexibility to travel between Trust sites as required

Desirable:

- Understanding of governance structures within academy trusts
- Experience working with trustees or non-executive board