St Carlo Catholic Academy Trust (SCCAT)

CFO Job Description

Chief Financial Officer Job Description

Salary £68,000

This is a new role within the Catholic Academy Trust (CAT) that will include additional operational responsibilities until further roles are created within the Trust.

The role will be part-time initially from April 2026, which we expect will start with a 1.5 day commitment in the summer term of 2026.

The CFO will report into the CEO of the CAT and the Resources and Audit Committee.

Overall Purpose of the Job

As a member of the Trust's Executive Team, the Chief Financial Officer (CFO) will have strategic responsibility for all aspects of Trust finance.

Delivering operational rigour and strategic direction, the CFO will play an integral role in supporting the development and growth of the Trust and ensure it continues to be financially sustainable.

This is a new role for a new Trust. The CFO will lead strategically and operationally to provide excellent financial leadership, guidance and support as the Trust develops.

Key Outcomes/Activities

To provide strategic guidance, leadership and management of all the Trust's finances within the scheme(s) of delegation, advising the CEO, Directors, and headteachers on all financial matters relating to the Trust.

To be responsible and accountable for the delivery of financial support services throughout the Trust, including the management of Trust's accounting system and internal controls and implementation of a new finance system and internal reporting structure.

To be the primary point of contact for all aspects of funding and financial/statutory returns.

To be responsible for the statutory accounts, financial returns and reports to Directors, RD/ DfE and other statutory bodies in accordance with guidance and externally determined deadlines.

To lead the promotion and delivery of sound financial management throughout the organisation, in line with the Academy Trust Handbook.

The CFO will ensure sound and appropriate financial governance and risk management arrangements are in place, prepare and monitor budgets and ensure the delivery of annual accounts in accordance with the Academy Trust Handbook, RD/DfE guidelines and all statutory requirements.

Finance, Audit & Risk

To ensure the Trust complies with its obligations in accordance with the funding agreement, the Academy Trust Handbook and the Trust's financial regulations and procedures.

To advise and support the CEO in the financial aspects of their responsibilities as Trust Accounting Officer.

The CFO must ensure that the Trust follows best practice in terms of financial governance, and ensure the probity, and legislative compliance, of all financial transactions, including the integrity and suitability of all control mechanisms (audit and risk management).

As financial lead in the strategic planning process, deliver annual and medium -term budget plans, periodic forecasts and funding requirements, working closely with the CEO and headteachers to ensure consistency with the Trust's strategic and financial objective.

Contribute fully to all areas of Trust strategy and provide financial analysis and guidance on activities, plans and targets.

Ensure that infrastructure services are of high quality and well-led, cost effective and efficient, and enable schools to focus on the quality of education.

To ensure a successful approach to managing the General Annual Grant (GAG) that achieves a strategic, needs-led approach to resourcing, promoting the mission and identity of one trust looking after all young people's interests.

Continually review and improve the existing financial systems and policies ensuring they are streamlined, efficient, robust, and compliant and support current activities and future growth.

Lead on the Trust's approach to Audit & Risk Management.

Act as the main point of contact for the Trust's appointed Internal Audit and External Audit consultants, acting as a conduit between Trustees, audit consultant teams and academy/Trust colleagues involved in audit processes and reviews.

Ensure the Trust's approach to internal and external scrutiny is fit for purpose and in line with statutory guidelines.

Lead on the management of the Trust's Risk Register and direct colleagues as appropriate to ensure risks are managed effectively and updates are reported to Trustees in line with the reporting calendar.

Manage the development of financial reporting systems including KPI's.

Provide financial management reports to the Board of Directors, Resources and Audit Committee, and RD/DfE.

To be responsible for the preparation of the annual accounts to prescribed standards, taking responsibility for the completion and submission of statutory/regulatory reporting in line with prescribed timelines.

To manage the income and expenditure budgets across the Trust in line with the scheme of delegation, and to identify any potential financial risk and implement strategies to address issues arising.

To proactively manage the Trust's relationship with its bankers, to ensure that appropriate and efficient systems are in place for the Trust's accounting procedures.

To proactively manage the cash position of the Trust and its operating activities, reporting regularly on this aspect of financial management to the Trustees.

To coordinate tax and treasury management practice and policy, with particular reference to charitable status, cash management and investments.

Strategic Leadership Responsibilities

To provide strategic advice to the CEO, Directors, headteachers, SBMs and Committees on financial and operational issues.

To prepare the Trust's annual financial forecasts, medium and long-term corporate plans and report to the CEO, Directors and headteachers.

Develop and implement strategies for maximising the Trust's current finances.

Lead the central finance team, including line management and the development and quality assurance and oversight of financial systems and procedures.

To build close and effective working relationships with key partners and stakeholders.

To participate in the management of major Trust projects as required by the CEO.

To oversee the Trust's long-term plan for capital development and investment, managing all financial aspects of major capital projects.

To develop, design and implement financial policies and working practice across the Trust to streamline functions and ensure efficiency and value for money.

Work closely with the CEO, Central Team, Trust Board and School SBMs in relation to risk mitigation, best value procurement and resource management across the Trust ensuring financial sustainability and appropriate use of funding.

Payroll & Pensions

Ensure services for Payroll and Pensions across the Trust are efficient, of best value and ensure compliance with all relevant legislation and up to date legislation.

Organisational Responsibilities

To be responsible for the strategic planning, development, design, organisation and monitoring of financial support services and whole Trust systems/procedures/policies.

Undertake a lead role in supporting the conversion of new schools into the Trust including overseeing due diligence for all financial and infrastructure aspects.

Audit all financial functions across the Trust and recommend new structures to meet evolving needs.

To promote financial awareness and training throughout the Trust.

To interpret matters of policy/procedure/statute and ensure the Trust's compliance and initiate appropriate action arising.

To identify and implement opportunities for collaborative working across the CAT

To produce, and respond to, complex correspondence from stakeholders and external agencies.

To participate in training and other learning activities and performance development as required.

To maintain confidentiality at all times in respect of Trust-related matters and to prevent disclosure of confidential and sensitive information.

Other duties commensurate with the senior nature of the post, as directed by the CEO.

Skills and Qualifications

The Trust CFO and finance staff must be appropriately qualified and/or experienced, including educated to degree level or equivalent ideally with a recognised accountancy qualification (eg. ACCA, ACA,CIMA)

The CFO and other key financial staff should maintain continuing professional development and/or personal development and undertake relevant ongoing training.

The CFO should have proven leadership in senior finance roles, with experience in managing complex budgets and financial systems, excellent analytical, interpersonal, and communication skills, with the ability to explain financial matters to non-finance staff, together with education Sector Knowledge of academy funding and educational regulations.

Other desirable characteristic include resilience and the ability to grow professionally and flexibly within a developing organisation, the ability to remain calm under pressure and work to tight deadlines, portray a professional and approachable demeanour in relating to all members of the Trust community and show a high level of personal integrity with proven experience of handling sensitive situations with tact and diplomacy and with complete respect for confidentiality

Safeguarding and Wellbeing

Trust is committed to the safeguarding and wellbeing of all our students and staff. It is a core expectation of every member of staff to safeguard the wellbeing of every child and young person within the Trust. Staff are supported through regular training and are expected to adhere to the Trust's Safeguarding and Child Protection Policy at all times. In addition to the statutory pre-employment checks, this appointment will be subject to an enhanced DBS check, a safeguarding background check and interview. St Carlo CAT is an equal opportunity employer and we welcome the unique contributions that everyone can bring to the CAT in terms of education, opinions, culture, ethnicity, race, sex, gender identity and expressions, nation of origin, age, languages spoken, colour, religion, disability, sexual orientation and beliefs.