

The people behind  
the magic.



JOIN OUR TEAM

## Chief Financial Officer (CFO)

**Salary:** SL2 – 1-4 (£67,371) – (£74,048) – (Potential to increase this range based on high performance and growth)

**Hours:** Full Time, permanent

**Accountable to:** CEO

**Location:** Trust central office

**Closing date:** Thursday 13 February at 10am

**Interviews will take place:** Friday 28 February 2025

**Start date:** 22 April 2025 (exact date flexible via mutual arrangement)

We reserve the right to close the application date early, if we receive sufficient applications for the role.

Applications are welcomed from candidates looking for a part time role.



## THE JOB

# Chief Financial Officer

## When schools collaborate, incredible things happen.

We are seeking an exceptional financial professional to join **Together Learning Trust** as our Chief Financial Officer (CFO). This pivotal role arises due to the retirement of our current CFO, and we are excited to welcome a leader who will contribute to shaping the next chapter of our thriving Trust.

Together Learning Trust is a high-performing, highly regarded organisation, securely placed in the top 10% of most improved Trusts nationally. We proudly lead nine schools—three secondary, five primary, and one special school—serving over 5,700 young people and employing more than 750 staff across Calderdale and Kirklees.

This is a phenomenal opportunity to work alongside a dedicated, talented, friendly and committed leadership team. By bringing a credible and inspiring presence, you will be instrumental in our ambitious growth strategy, ensuring financial excellence and driving positive outcomes for our schools and communities.

### What We Are Looking For:

Having a proven track record of financial leadership, a deep understanding of Multi academy Trust (MAT) finance and a vision for driving continuous improvement is essential. The CFO will work closely with the CEO, Executive Headteacher, Executive Director of Education, Director of Business and Operations, Director of People, and ICT Director. Key responsibilities include:

- **Building High-Performing Teams:** Lead, inspire and guide our central finance team and collaborate with business staff to ensure they deliver exceptional service.
- **Strategic Leadership:** Shape and enhance the Trust's financial structures, operating processes, and long-term financial strategy as we expand.
- **Driving Excellence:** Oversee the financial and business aspects of the Trust, ensuring operational efficiency and the most cost-effective procedures and systems.
- **Developing Efficient Systems:** Streamline and optimise financial operations and champion innovative processes that reduce unnecessary workload for staff.
- **Inspiring Confidence:** Establish credibility and the trust of stakeholders by delivering consistent, high-quality operational support and strategic advice.
- **Building Networks:** Forge strong relationships with other finance and business leaders to share best practices and seek opportunities for collaboration, innovation and improvement.
- **Delivering Exceptional Service:** Set the highest standards for yourself and your team, driving exceptional performance that reflects our commitment to excellence.

## About the Role

As CFO, you will oversee the financial health of the Trust, ensuring compliance with regulatory frameworks, including the Academy Trust Handbook. You will:

- Lead and manage the finance team.
- Provide expert advice to the CEO and Senior Leaders and Board of Trustees.
- Play a critical role in the Trust's strategic development.
- Work under pressure to deliver results, demonstrating resilience, exceptional leadership, and the ability to manage competing priorities effectively.

You will need outstanding financial acumen and the capability to navigate complex challenges while upholding the Trust's vision and values. Your leadership will be central to creating systems that empower our schools to deliver exceptional education and outcomes.

You will be based at our vibrant Head Office at The Brooksbank School, working closely with the Executive Leadership Team, Trust Central Team, and school business staff. We use **Access Finance** for financial and budget management and introduced **iTrent** in February 2024 for payroll, pensions, HR, and staff recruitment.

## WORKING TOGETHER

### Benefits for you and your development?

We offer:

- A tailored induction, ongoing development, and comprehensive support to help you thrive in the role.
- The chance to work with an ambitious, dynamic team committed to transforming lives through education support.
- A range of benefits to support your financial, professional, and personal wellbeing, with options that extend to your family.
- Unparalleled opportunities for personal and professional growth as you develop your expertise alongside the role.

At Together Learning Trust, you'll be part of a team united by a shared vision and the drive to create brighter futures for young people in our region.

### Ready to Make a Difference?

If this sounds like the opportunity for you, we'd love to hear from you. Please complete the enquiry form on our microsite to arrange an initial conversation with me and explore how we can work together to achieve great things.

**DAVID LORD, CHIEF EXECUTIVE OFFICER**

## JOB DESCRIPTION

# Chief Financial Officer (CFO)

<b>Responsible to:</b>	<b>Chief Executive Officer (CEO)</b>
<b>Salary:</b>	SL2 – 1-4 (£67,371) – (£74,048) Full Time, permanent
<b>Accountable to:</b>	CEO
<b>Main Purpose</b> Working in harmony with Trustees, CEO and Executive Leaders (ELT) to lead TLT's financial strategy and management ensuring financial viability and sustainability. <ul style="list-style-type: none"><li>• Undertake the statutory role of Chief Financial Officer (CFO) for the Trust. As outlined in the Academy Trust Handbook</li><li>• Support the CEO in their role as the Trust's Accounting Officer, providing advice and guidance on financial matters</li><li>• Maintain the Trust accounts in line with the Trust Funding Agreement and Academy Trust Handbook.</li><li>• Have responsibility for all aspects of Trust finance, including all financial returns to the DFE and monthly financial reports to Trustees and ELT.</li><li>• Support schools within the Trust as well as new and prospective schools as part of the trust growth strategy</li><li>• Line manage and lead finance staff, fostering a collaborative, action-orientated team culture focused on accuracy, timeliness, and efficiency</li><li>• Build upon and embed a culture focusing on driving internal excellence; uphold, promote, and model the Trusts' vision and values</li></ul>	
<p>The duties and responsibilities listed below are indicative of the role of CFO but are not intended to be exhaustive. The post-holder will be expected to take on additional responsibilities appropriate to the role as they arise.</p> <p>You will take a lead role in the following areas:</p> <p><b>Financial Strategy &amp; Leadership</b></p> <ul style="list-style-type: none"><li>• Provide leadership on the Trust's finance, audit, and risk strategy to optimise financial performance and the strategic position of the Trust.</li><li>• Contribute to the Trust strategy, offering financial analysis and guidance on activities, plans, and targets.</li><li>• Take proactive action to address financial risks, problems, and irregularities.</li><li>• Auditing all financial functions across the Trust, recommending new structures to meet evolving needs.</li></ul> <p><b>Budgeting &amp; Reporting</b></p> <ul style="list-style-type: none"><li>• Manage the budget process, from planning through to approval and submission to DFE, working with the CEO, ELT, school leaders and trustees. Oversee any budget revisions.</li><li>• Ensure the Trustee Board and Executive Leadership Team have regular and accurate information to manage delegated budgets, providing professional advice and assistance as required.</li></ul> <p><b>Financial Reporting</b></p> <ul style="list-style-type: none"><li>• Prepare the annual accounts to prescribed standards and take responsibility for the completion and submission of statutory and regulatory reporting within defined timelines.</li><li>• Provide financial management reports to the Board of Trustees, Finance, People &amp; Resources Committee and Audit and Risk Committee.</li><li>• Ensure the timely completion and submission of all statutory financial returns.</li><li>• Oversee and support schools with all grant funding applications and organise the submission to the relevant body.</li><li>• Manage the procurement of external auditors to deliver agreed services.</li><li>• Ensure that the asset registers of the school are kept up to date, including accounting for disposals.</li></ul>	

### **System & Policy Improvements**

- Continually review and improve existing financial systems and policies, ensuring they are efficient, robust, compliant, and able to support current activities and future growth.
- Develop and implement a robust approach to internal scrutiny, and manage the external audit process, acting as the primary liaison between schools and auditors.

### **Compliance & Governance**

- Ensure that the Trust and Trustees comply with the obligations as set out by the DFE/ESFA in the latest version of the **Academy Trust Handbook**.
- Advise and support the CEO in their responsibilities as the Trust's Accounting Officer.
- Ensure all financial processes are compliant with the Academy Trust Handbook, Companies House regulations and Charity Law, operating under appropriate schemes of delegation and adhering to best practices in financial governance.
- Contribute to the trusts risk management register, including identifying strategic and operational financial risks, taking steps to mitigate these risks.

### **Operational & Infrastructure Services**

- Work with the Director of Business and Operations to ensure that infrastructure services are of high quality, well-led, cost-effective, and efficient, enabling schools to focus on the quality of education.
- Use analysis and complex financial data to develop solutions, plans, and strategies that support medium and long-term success.
- Oversee financial management information systems (e.g., Access), budgeting, and forecasting processes.

### **Tax & Treasury Management**

- Oversee all tax and treasury management practices and policies, such as VAT returns, payments to HMRC for tax, NI, etc.
- Be responsible for the trust bank accounts and manage the Trust's relationship with bankers, ensuring that appropriate and efficient accounting systems are in place.
- Ensure cash flow forecasts are carried out on a regular basis to maximise Trust cash reserves, making best use of high interest accounts.

### **Resource & Value Management**

- Challenge and support senior leaders to ensure resource management complies with best value expectations and financial standards.
- Ensure staff at appropriate levels are trained to ensure effective financial practices.
- In conjunction with the Director of Business & Operations:
  - establish and monitor effective procurement procedures in order to achieve financial efficiencies and value for money, including overseeing any required tendering procedures.
  - Organise the necessary insurance arrangements for the trust
  - Develop a capital strategy for the trust, managing capital funds and securing capital funds through bids.

### **Pension and Payroll**

- Oversee arrangements for efficient payroll and pension administrative systems, ensuring compliance with all relevant and up-to-date legislation.
- Oversee the Teacher Pension annual audit, being the conduit between the managed payroll/pension service and external auditor.

### **Multi-Academy Trust Conversion**

- Support the conversion process of new schools into the Trust, ensuring financial and administrative requirements are met.
- Conduct financial due diligence on new schools applying to join the trust and report to ELT and trustees with recommendations.

### **Line Management, Collaboration & Training**

- To line manage and performance manage the central finance team, which includes payroll and pension staff in the central finance team.

- To be involved in the recruitment of all finance/payroll staff in the trust.
- To participate in training and national professional networks to keep abreast of current and best practice.
- To consult and collaborate with school business professionals in schools to keep them informed of policies, procedures and best practice.

#### **General**

- You will be aware of and comply with policies and procedures relating to child protection, inclusion, health, safety and security, confidentiality, and data protection, reporting all concerns to an appropriate person without delay
- You will participate in training and other learning activities and performance development as required
- You will ensure you carry out your role in a way that demands high standards whilst supporting inclusion and welcoming diverse thinking.
- You will ensure strict confidentiality in all areas of work
- You will work and process personal and sensitive information in accordance with the Data Protection Act 2018 and the UK General Data Protection Regulations (UK GDPR)
- You will ensure work is conducted in a way that protects the safety and security of information (e.g., strong passwords, reporting breaches, securing paper records, securely disposing of records)
- You will understand and comply with the statutory guidance regarding safeguarding of children, always ensuring the safeguarding and promotion of children's welfare, reporting any concerns to the Designated Safeguarding Officer at once
- You will always comply with the Trust's policies and procedures
- You will undertake other reasonable duties (with competence and experience) as requested, in accordance with the changing needs of the organisation

#### **Expected Behaviours**

- Support the ethos, vision, principles and values of the Trust
- Treat colleagues, students and all members of the community with respect and consideration
- Set a good example to students in terms of appropriate dress, standards of punctuality and attendance
- Take responsibility for own professional development and participate in arrangements adopted by the Trust for the assessment of the development of others
- Reflect on our own practice as well as the practices of the Trust with the aim of improving all that we do and achieving excellence
- Read and adhere to Trust policies and implement Trust improvement plans
- Participate in the development and management of the Trust by attending various team and staff meetings
- Undertake professional duties reasonably assigned to you by the CEO
- Be proactive and take responsibility for matters relating to health and safety
- To play a full part in the life of the Trust community, to support its distinctive values and ethos and to encourage and ensure staff and students follow this example

#### **Other specific duties**

Whilst every effort has been made to explain the main duties and responsibilities of the post, each individual task may not be identified. Employees will be expected to comply with any reasonable request from the Chief Executive Officer and ELT to undertake work of a similar level that is not specified within this job description.

This job description is current at the date shown. It will be reviewed at least annually and, in consultation with you, it may be changed by the Chief Executive Officer to reflect or anticipate changes in the job commensurate with the grade and job title.

We are committed to safeguarding children, young people and vulnerable adults. All staff and volunteers are expected to behave in a way that supports this commitment and are subject to an enhanced DBS check. Please be aware that **it is an offence to apply for the role** if you are barred from engaging in regulated activity relevant to children.

## PERSON SPECIFICATION

# CFO

To be assessed through application, reference, interview and certificates

CRITERIA	ESSENTIAL	DESIRABLE
<b>Qualifications</b>		
Educated to degree level or equivalent	x	
Professional accounting qualifications e.g. ACA, ACCA, CIMA, CIPFA, AAT or equivalent.	x	
Qualified accountant professional with a minimum of 5 years of relevant post-qualifying accounting and financial management experience		x
Evidence of continued commitment to personal professional development for yourself and others	x	
<b>Knowledge, Skills and Experience</b>		
Senior financial management and strategic leadership either in the public or private sector with a high level of complex accountability	x	
Management experience with a track record of leading strong and effective teams	x	
Strategic thinker and ability to exercise strong leadership	x	
Understanding and interest in education	x	
Strong judgement and the ability to look at risk analysis through a commercial and financial perspective	x	
Strong technical ability to link strategy to execution	x	
Leadership style to create a positive and collaborative working environment	x	
Knowledge and experience of using effective financial management systems (eg. Access)	x	
Experience of working with external agencies (eg. DFE, EFSA, Local Authority, Auditors)	x	
In depth knowledge of statutory requirements, procedures and regulatory requirements relating to academies / academy trusts		x
Experience of high-level reporting to a Board (eg. Finance, Audit and Risk)	x	
Business acumen and commercial awareness	x	
High level of IT competency, literacy and numeracy skills	x	
Negotiation skills (eg. contracts negotiation)	x	
Highly effective oral and communication skills	x	
Experience of payroll and pension systems	x	
Knowledge of statutory and regulatory accountability frameworks, for example the Academy Trust Handbook, Charity Commission Guidance, etc.	x	
Experience of working in an Academy setting with knowledge and understanding of multi-academy structures and the wider education sector		x

<b>Personal Attributes</b>		
A commitment to inclusive education	x	
Ability to build positive working relationships with colleagues	x	
Self-driven, results-orientated with a positive outlook	x	
A natural forward planner who critically assesses their own performance	x	
Mature, credible with excellent interpersonal skills	x	
Reliable, punctual, tolerant and determined	x	
Empathetic leader - able to see things from another person's point of view	x	
Able to motivate and persuade, negotiate and influence others	x	
Well-presented and professional	x	
Keen for new experiences, responsibility and accountability	x	
Able to get on with others and be a team player	x	
Ability to evaluate own learning needs and actively seek learning opportunities	x	
Integrity and exercises confidentiality	x	
Ability to think pragmatically and be solutions focused	x	
Commitment to the safeguarding of vulnerable young people and adults	x	



## HOW TO APPLY

# Say yes to new adventures.

If our trust sounds like a place in which you could really make a difference, then we would love to speak with you, to arrange an introductory call with our CEO David Lord, you can book a time via the link on [our dedicated web page](#).

If you have any questions about the application process, please email [recruitment@tl.school](mailto:recruitment@tl.school).

[Make an application here](#).

### SAFER RECRUITMENT

We are committed to safeguarding children, young people and vulnerable adults. All staff and volunteers are expected to behave in a way that supports this commitment and are subject to an enhanced DBS check. Please be aware that it is an offence to apply for the role if you are barred from engaging in regulated activity relevant to children. If you are shortlisted for interview, we will undertake an online public search in line with guidance from the Department for Education and Keeping Children Safe in Education 2024.