



# Chief Financial Officer

## Candidate Information





SMART Schools Trust  
Luxstowe  
Liskeard  
Cornwall  
PL14 3EA

Dear Applicant,

Thank you for your interest in the post of Chief Financial Officer at SMART Schools Trust.

We are looking for a leader capable of taking this successful educational Trust on the next step of its journey.

As the Chair of the Trust Board, I am proud of the excellent progress we have made since coming together as a group of schools and particularly proud of the high-quality improvements to estates, operations and services. These improvements would not have been possible without the excellent financial management and related systems that the team have implemented and maintained. I am particularly proud that the proportion of funding that is directed back into the classroom in our Trust is within the highest 20% in the country. This stability has enabled our core educational offer to improve each and every year whilst retaining an excellent track record of recruiting, retaining and developing our staff.

The successful candidate will need to demonstrate the proven ability not only to lead teams from a position of authority, but also the ability to influence and support collaboration. The role involves significant opportunities for Trust-wide working, and the need to actively engage with and support the wider community for the benefit of all students and staff.

You will need to:

- Understand and engage with the complexities of the school communities and the wider Trust
- Turn plans into actions that make a positive difference
- Sensitively secure change by understanding the needs of the internal and wider community
- Inspire confidence
- Develop clear narratives that enable a determined focus on agreed priorities by staff
- Devise and run systems that support wellbeing amongst students, staff and stakeholders
- Work effectively and productively as a member of our Trust Senior Leadership Team

You will be supported by:

- Dedicated school leadership teams in each school
- A well-qualified and enthusiastic teaching and support staff team
- A committed Trust Board and Local Governing Teams who believe in appropriate scrutiny, but also personal development and support for all staff
- A committed Trust Operational Leadership Team (TOLT) which you lead
- A collaborative and supportive team approach

In your application we would like you to tell us about:

- How you have used your personal qualities and abilities to lead, and the impact you have had, particularly in your current position
- How you have continuously developed staff you have worked with

I look forward to receiving your application.

Yours sincerely

A handwritten signature in black ink, appearing to read "Jamie Crisp".

Jamie Crisp – Chair of the Trust Board



## Our SMART Shared Values

Thank you for your interest in the post of Chief Financial Officer at SMART Schools Trust.

Since our inception as a Trust in 2016 we have worked hard to ensure that all our staff in every role throughout the Trust feel part of one team, working together for the benefit of all children in South-East Cornwall. To this end, we all come together each February for a shared training day in which over 100 staff share good ideas that they believe others would find useful. The day is a good illustration of our wider aim to provide opportunities for all our staff to value and develop expertise in all its forms.

If you are a successful candidate you will become a member of our Trust Senior Leadership Team, working collaboratively to develop and refine our shared vision to

**EQUIP** all members of our community with the skills, knowledge and confidence to be outstanding individuals by **E**xpecting the very best of all staff and students; **Q**uestioning deeply; **U**nderstanding our goals; **I**nspiring lifelong learning and **P**raising positive achievement in all its forms.

Within this framework, you will have the agency to engage the hearts and minds of the community through your own vision and passion for leadership to further enhance the outcomes and community ethos of the Trust.

The mutual respect between staff and students has always been heavily prized by our whole community and has given rise to some of the most amazing Trust student leaders, with whom, I have had the pleasure to work. They are used to their voice being heard and their individuality celebrated. This has been as true for our educational leaders as our operational leaders.

We are committed to ensuring that all staff in SMART have the opportunity to develop their skills, expertise and leadership each and every year they work with us, and I wish you the best of luck in taking this next step in your own professional journey.

Dan Buckley  
CEO

## Person Specification

SMART Schools' Trust is committed to safeguarding and promoting the welfare of children and young people and expects all staff to share this commitment.

Attributes	Essential	Desirable
<b>Qualifications</b>	<ul style="list-style-type: none"> <li>Professional finance or finance related qualification at graduate level (i.e. ACA, ACCA, CIMA, CIPFA, MAAT or equivalent)</li> </ul>	<ul style="list-style-type: none"> <li>A leadership qualification</li> </ul>
<b>Knowledge Understanding and Experience</b>	<ul style="list-style-type: none"> <li>Significant post qualification experience and in-depth professional knowledge acquired through experience</li> <li>Experience of managing significant financial resources with a good appreciation of relevant regulatory frameworks</li> <li>Familiarity of financial processes and procedures</li> <li>Experience of effectively managing a team</li> <li>Experience of managing budgets</li> <li>Experience of communicating with colleagues and contractors at all levels of the organisation and the ability to negotiate</li> </ul>	<ul style="list-style-type: none"> <li>In-depth knowledge of statutory requirements, procedures and regulatory requirements relating to academies</li> <li>Experience of using and supporting others in the use of financial software packages, including a working knowledge of PS Financials and IMP</li> <li>Experience of working in a similar role and environment</li> <li>Significant experience of managing staff</li> <li>Experience of managing payroll and HR within a similar role</li> <li>Knowledge and experience of acquiring grant funding</li> <li>Knowledge of financial accounting and contracting procedures and practices</li> <li>Experience of project management</li> </ul>
<b>Personal and professional qualities</b>	<ul style="list-style-type: none"> <li>A commitment to openness, fairness and integrity</li> <li>Holds an optimistic and positive attitude</li> <li>Resilience and determination to overcome challenge</li> <li>Strong persuasive, influencing and interpersonal skills with the ability to communicate clearly and confidently at all levels</li> <li>A high level of IT competence, literacy and numeracy skills</li> <li>Excellent skills in strategic planning and strategic management of financial resources</li> <li>Clear analytical skills to allow the exploration, evaluation and interpretation of information and opinions, and utilisation of management information systems</li> </ul>	<ul style="list-style-type: none"> <li>A team-player, personable, and emotionally intelligent</li> <li>Deep commitment to students, staff and parents in the Trust and wider community</li> </ul>

Attributes	Essential	Desirable
<b>Personal and professional qualities cont.</b>	<ul style="list-style-type: none"> <li>• Strong decision-making skills with the ability to make decisions and recommendations based on the analysis of options</li> <li>• Capacity to work under pressure to meet deadlines and organisational priorities</li> <li>• Good leadership skills and ability to inspire and challenge colleagues</li> <li>• Commitment to staff's and own personal development</li> <li>• Flexible in terms of working patterns and evolution of the role</li> </ul>	
<b>Developing self and working with others</b>	<ul style="list-style-type: none"> <li>• Experience of conducting effective appraisal</li> <li>• Commitment to professional development across an organisation and where the opportunity has arisen, across their wider Trust</li> <li>• Experience of coaching</li> <li>• Ability to demonstrate commitment to own continuous learning</li> <li>• Ability to demonstrate a commitment to and experience of positive team working</li> </ul>	<ul style="list-style-type: none"> <li>• Can provide examples of working with external partners to secure improvements</li> <li>• Experience of working across a Trust or similar structure</li> </ul>
<b>Other</b>	<ul style="list-style-type: none"> <li>• Driving licence and own transport</li> <li>• Capable of multitasking, problem solving and delivering to strict deadlines</li> <li>• Exceptional interpersonal and communication skills</li> <li>• Capable of delegating, motivating across different areas, and guiding team effort towards efficient productivity and meeting objectives</li> <li>• A keen, positive and enthusiastic team player who is approachable and amicable</li> </ul>	<ul style="list-style-type: none"> <li>• Up to date professional knowledge of leadership arising from regular wider reading</li> <li>• Has experience of working within a wider community</li> <li>• Has shared and developed practice amongst organisations</li> </ul>

## Job Description

**Post: Chief Financial Officer**

**Responsible to: Chief Executive Officer**

**Salary: O1 – O5 (£68,312 - £75,321 pa) dependent on experience (pay award pending)**

**Start Date: 5th January 2026 or earlier if current contract notice period allows**

### Key purpose

- Provide strategic management and leadership of the financial and commercial operations and performance of the South East Cornwall Multi Academy Regional Trust through the leadership of:
  - TOLT (Trust Operational Leadership Team) comprising Head of ICT, Head of Estates, Head of Finance and Head of Operations.
  - TSS (Trust Shared Services) comprising Head of HR and administration.
- Undertake the role of Chief Financial Officer as outlined in the Academy Trust Handbook and other documents from DfE.

### This translates as the responsibility to:

- Ensure that the Trust's resources are managed efficiently, ethically, professionally, with integrity and conforming to all internal and external regulatory requirements and in a sustainably sound manner.
- Provide sound financial advice to the trustees, and senior management colleagues.
- Act as the leading point of reference for financial and commercial issues.
- Report on a timely basis to the DfE and other relevant bodies in line with their specific requirements.
- Be a catalyst for driving efficiencies across all aspects of the Trust.

### Specific duties and responsibilities include:

- Contribute to the ethos, development and success of the Trust.
- Act as the leader for all finance related work; this includes leading staff within the Trust employed with finance, operations, estates, ICT, HR and business management functions.
- 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.
- Ensure that monthly management accounts and other ad hoc reports as required are prepared on a timely basis along with appropriate management commentary comparing performance against budget and analysing variances.
- Work with the CEO and leadership teams in the Trust to develop and deliver the three year financial plan taking into account DfE guidelines/funding and identifying additional sources of external revenue and funding.
- Ensure the appropriateness of the key assumptions included in the corporate plan, medium- and long-term financial plan and annual budget proposals.
- Prepare the annual budget in accordance with the requirements of the Trust and DfE.

- Maintain records to meet legal and tax requirements, and to measure both in the inputs and the outcomes of the Trust's operations.
- Production of 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.
- Establish and maintain the academy's financial and accounting systems and ensure the provision of financial information to the leadership teams of the schools, local committees and external bodies as required.
- Oversight of the Head of Finance who is the point of reference for all schools within the Trust to establish the annual budgets for each school, oversee the monitoring of expenditure and annual balancing of end-of-year accounts.
- Implementation and operation of rigorous and robust audits and controls.
- Manage the central accounting role; ensuring that efficient income and payroll controls are in place and adhered to.
- Management of the Trust's financial position at a strategic and operational level with the framework of financial control including:
  - Management of cash balances and cash flow
  - Management of tax and VAT liabilities
  - Identification of opportunities to improve value for money
- Ensuring 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.
- Establish and maintain the shared risk register for the Trust to record variation in key risks and opportunities as they arise.
- Liaise with the outsource company to ensure the integrity of accounting for payroll transactions and that payroll reconciliations are properly performed.
- Making appropriate arrangements for the external audit of accounts and liaison with auditors during their audit work.
- Making appropriate arrangements for annual Internal Scrutiny testing in line with the Academies Trust Handbook.
- Ensuring that an ethical purchasing system is in place to ensure value for money is obtained and best use made of resources.
- Preparing bids, and generating new income streams and grant funding, which are supportive of the Trust commitment.
- Preparation of financial appraisals for new projects.
- Management and oversight of the Trust's assets ensuring that the full inventory of assets is recorded in an asset register, and that accounting for fixed assets is in accordance with Companies Act and appropriate accounting standards.
- Ensuring appropriate insurance cover is in place, and arrangements are regularly reviewed and monitored.
- Keep abreast of financial developments across academies, including direction from the DfE and charity sector.
- Plan and manage the Trust's tax affairs under existing and new legislation.
- Liaise with appropriate bodies in such areas as: legal, regulatory, approvals and accreditations.
- Ensure that school-based business management staff receive timely, succinct and clear guidance to ensure that they are effective and efficient in the discharge of their duties.

## Key relationships

- CEO
- TOLT (Trust Operational Leadership Team) comprising Head of Estates, Head of Finance, Head of Operations and Head of ICT
- Headteachers in schools
- Staff appointed to or working on behalf of the TSS (Trust Shared Services)
- The Members, Trustees and Governors
  - DfE, RG and LA officers
- Trust appointed accountants and auditors
- CACE networks and other regional Cross Trust networks

## Ongoing expectations

- Provide visible leadership on all financial and operational issues
- Represent the Trust at external meetings and events
- Lead through high expectation and aspiration; being prepared to challenge mediocrity and under-performance
- Show fidelity to the commitment and ethos of the Trust and to the implementation of agreed policies and procedures
- Model the agreed vision and values through own behaviour and language
- Manage resources to ensure the best outcomes

## Confidentiality

- Ensure that confidentiality is maintained in line with agreed policies and protocols

## Safeguarding

- Comply with Trust policies and procedures on safeguarding

## Equality

- Ensure that the Trust reflects a vibrant and inclusive ethos which actively values and promotes diversity, unity and community cohesion, and supports pupils to become successful integrated citizens
- Actively challenge and address discrimination

## Beliefs, attitudes and personal attributes

- Relentless focus on high quality
- Resilient and persistent in goals, but adaptable to context and people
- Willing to develop a deep understanding of people and context
- Willing to take risks and challenge accepted beliefs and behaviours
- Self-aware and able to learn
- Optimistic and enthusiastic
- Values diversity and equality



## General

The post holder will:

- Be expected to actively support the work and ethos of the Trust
- Be expected to undertake such additional duties as may reasonably be requested by the CEO or their representative
- Participate in arrangements for appraisal and in the identification of areas in which they would benefit from training and undergo such training
- Proactively keep abreast of developments in relation to the post, and whenever possible and appropriate, attend professional development opportunities
- Comply with and support all policies related to equal opportunities and safeguarding children

This job description is neither exhaustive nor exclusive, and it may, be subject to modification and amendment in accordance with the needs of the Trust.





## How to Apply

A fully completed form and letter of application should be sent to the Trust's HR team by **Tuesday 16th September 2025 at 9:00am**.

Please send your application by email to: [hr@smart-trust.net](mailto:hr@smart-trust.net)

Interview dates are planned for **Tuesday 23rd September 2025**.

We would welcome visits to the Trust from prospective candidates and/or a conversation with the CEO.

Please contact Claire Askar, PA to the CEO on **01579 325732** or by email [caskar@smart-trust.net](mailto:caskar@smart-trust.net)

The Trust address is:

SMART Schools Trust  
Luxstowe  
Liskeard  
PL14 3EA

For more information regarding SMART Schools Trust, please visit our website at [www.smart-trust.net](http://www.smart-trust.net)

