



Testwood School

Chief Financial Officer

Application Pack



Caring | Inclusive | Ambitious

Contents

Welcome letter from the Headteacher	3
About Testwood School	4
Vision & Values	5
What People say about the School	6
Living and working in the area	8
Job Description	9
Person Specification	14
How to apply and Key Dates	17



Welcome letter from the Headteacher

Dear Candidate

I am delighted that you are interested in our Chief Financial Officer (CFO) role. We are proud of our students and school and believe that our staff culture is open, collaborative and supportive.

We are looking for a diligent finance professional, to lead our school's finance function, whilst also having oversight of operational services across the school. The school is seeking an exceptional individual with a proven track record in financial leadership and a comprehensive understanding of the responsibilities attached to stewardship of school finances. The CFO will work closely with other Senior Leaders to optimise resources to provide an excellent climate for learning, to enable our students to achieve their full potential.

As CFO, the postholder will oversee the financial health of the Trust, aligned to statutory requirements within the Academy Trust Handbook. The CFO will lead and manage the finance team, provide financial advice to Senior Leaders & Trustees and work to ensure our financial systems are robust and that our funds are spent judiciously.

This vacancy has arisen due to the retirement of our current postholder and we are looking forward to working with our new CFO on the next phase of school development priorities. The school respects its values and traditions but embraces change – we seek to learn from best practice elsewhere and prioritise the professional development of our staff. We do this not just to improve our effectiveness as a school, but also because we recognise that learning and development are as important to staff as they are to our students here at Testwood School.

If you too want the very best for young people, recognise that this can be challenging at times, are prepared to work hard, and would like to be a part of our school community then I would encourage you to apply to join us.



Tim Webber
Headteacher, Testwood School



About Testwood School

Testwood School has proudly served the community of Totton and Calmore for nearly eighty years and is highly regarded by it. Consequently there are very strong links between the community and the school; some of our students are the fourth generation of their family to be educated at Testwood. During this time the school has developed into a strong community of students and staff, where students can learn in a supportive and caring environment.

Testwood is a 'Good' school, but we are not complacent about the challenges that we face in meeting the needs of the community we serve and ensuring that all of our students attain highly, are fully prepared to take ambitious steps into their futures, and make a positive contribution to their communities. With this in mind, we aim to nurture our young people to become respectful, resilient and proud to take responsibility in our community. We strive to do this by consistently acting in accordance with our core values of being **Caring, Inclusive and Ambitious**.

The School has a strong pastoral care system, with support for the physical and emotional welfare of our students. We are equally proud of our traditions, such as our House system, which is designed to give students and staff a sense of identity and to provide a range of activities beyond the classroom.

The school benefits from a recently refurbished 3G Artificial Turf Pitch, a Sports Hall, tennis courts, gymnasium, fitness studio and two drama/dance studios – all of which enable the school to provide a full range of extra-curricular activities and generate additional lettings income. We believe that such enrichment activities enable students to develop important life skills such as leadership, teamwork, problem-solving and communication.



Vision & Values

“Pupils are rightly proud and happy to be part of this inclusive and caring school.”

Ofsted 2024



During the autumn term of 2023, a group of school stakeholders (comprising students, staff, parents and carers, and Trustees) worked to identify the vision for Testwood School (based on what we want our students to be like when they leave us). This culminated in a vision statement that reflects the combined ethos of the different stakeholder groups.

Vision

“Nurturing our young people to become respectful, resilient and proud to take responsibility in our community.”

Values

All Testwood students and staff strive to achieve this vision in their everyday behaviours, which are underpinned by the Testwood values:

**Caring
Inclusive
Ambitious**



“The school has a clear vision for continued improvement and has high expectations of pupils’ achievement.”

Ofsted 2024

What People say about the School

“Parents and carers are positive about the school. They particularly appreciate the high levels of support that pupils get when they join the school.”

Ofsted 2024

“Pupils enjoy the breadth of extra-curricular provision, stating that there ‘is something for everyone’.”

Ofsted 2024

“The staff are brilliant; committed, hardworking, with a great sense of humour. We are a collaborative team, working closely together and always supporting each other.”

Staff



“Testwood has been amazing for my daughter. She has grown so much as a person whilst she’s been here.”

Parent

“The school has exceeded my expectations in the way it has nurtured and looked after my son.”

Parent

What People say about the School

“I have worked in 8 schools during my career, and this is my favourite by some distance. We are indebted to those who have worked at Testwood before us for creating such a good reputation and solid foundations on which to build. We have high standards to live up to and we expect everyone at Testwood to improve the school so that we hand it over to our successors as an even stronger school than we found it.”

*Tim Webber
Headteacher*

“Pupils are rightly proud and happy to be part of this inclusive and caring school.”

Ofsted 2024

“Testwood School is a community with a strong bond between staff, students and parents a special place to work I feel privileged to be part of such a supportive environment.”

Staff

“It is such a caring and positive environment. The teachers are encouraging and help you, whilst still letting your work be authentic and genuine to my visions.”

Year 10 Student



Living and working in the area

The school is located in Totton in Hampshire – a market town approximately 5 miles west of Southampton city centre. Residents of the town benefit from a good range of amenities, including a number of pubs and cafes, parks, a leisure centre, shopping, art galleries, a cinema and museums.



Further afield, there are plenty of opportunities for outdoor pursuits, as Totton is situated on the edge of the New Forest National Park, the Testwood Lakes Nature Reserve and Eling Tide Mill.

The town also has excellent transport links, with access to the M27 & A32, plus regular bus services and railway links to Southampton, Bournemouth and London Waterloo.



Chief Financial Officer Job Description

Job title:	Chief Financial Officer
Contract Type:	Permanent, full-time
Reporting to:	Headteacher
Responsible for:	Finance Assistant, IT Network Manager, Site Manager, School Games Officer & First Aid Officer
Salary:	L5-L9 (£54,939 - £60,644)

Purpose of the role

To provide an outstanding financial management service for the Testwood School Trust, to ensure financial resources are managed and maximised for the benefit of the students. This includes oversight of all aspects of the School's finance function. To be responsible for strategic financial planning; budget control; managing financial risks; financial reporting; and ensuring the organisation's sustainable economic health.

Key responsibilities

a) Strategic Responsibilities

Strategic Leadership and Trust Development:

- Advise the Headteacher and the Trustees on all matters relating to financial strategy and operations.
- Contribute to developing and implementing the Trust's strategy, providing financial analysis and guidance on all activities, setting financial objectives, and monitoring performance.
- Conduct financial due diligence on schools/colleges/organisations applying to join the trust and report recommendations to the board and other trust leaders.
- Contribute to the Trust's risk management efforts, including identifying strategic and operational financial risks, taking steps to mitigate these risks, and maintaining the Trust's risk register.
- Develop, implement, and monitor the Trust's business plan, using effective financial and budget modelling and benchmarking to support strong decision-making.

Financial Management and Control:

- Manage the budget process, from planning to approval, working with the Senior Leadership Team and the Trustees.
- Provide accurate and timely information to the Headteacher and to the Trustees to enable effective budgetary control.
- Develop, implement, and monitor the Trust's financial policies and procedures on procurement, virements, asset management and disposal, etc., in accordance with the Academy Trust Handbook, to ensure robust financial management systems are in place.
- Take appropriate action to address financial risks, problems, and irregularities.
- Develop and maintain an effective internal audit procedure for the Trust, including producing audit reports and making recommendations for improvement.
- Manage the external audit procedures for the Trust and follow up on any recommendations resulting from audits.
- Establish and monitor effective procurement procedures to achieve financial efficiencies, including overseeing the tendering process.
- Oversee the Trust's commercial contracts, ensuring they represent value for money.
- Arrange and manage necessary insurance arrangements for the Trust.
- Manage the Trust's tax and National Insurance arrangements, including ensuring claims for VAT and business rates are submitted, and refunds are received and appropriately accounted for.
- Manage the Trust's cash position, including overseeing bank deposits.
- Support the income generation strategy for the Trust.

Reporting and Compliance: Leadership and Management

- Complete and submit financial returns as required by the Department for Education, the Charities Commission, and Companies House.
- Prepare and submit the Trust's financial returns and reports, including annual and monthly management accounts.
- Maintain the Trust's accounts per the funding agreement and the Academy Trust Handbook.
- Monitor developments to legislation around payroll, pensions, and benefits, implementing changes and adapting processes as required.

- Support effective leadership and governance by providing appropriate and timely reports to the Headteacher and the Trustees.

Leadership and Management:

- Take responsibility for the Trust's financial management system, including managing user access, providing training, considering future system developments, and generating reports.
- Manage designated personnel, taking responsibility for their professional development and ensuring best practice is always observed.
- Ensure the effective delivery of payroll for the Trust.
- Develop effective relationships with the Trust's stakeholders and partners to support its development and operation.
- Act as a representative for the Trust in external networks and forums, raising its profile, engaging with the wider sector, and ensuring that the Trust is alert to information, changes, and opportunities that could affect its work.

Personnel Management:

- Produce contracts for new employees
- Maintain accurate personnel files for every employee
- Ensure that the Single Central Record is accurate and complete
- Liaise with Human Resources provider for advice on HR issues
- Oversee the recruitment of support staff



Buildings and site

- Be responsible for health and safety issues on site, including fire safety
- Be responsible for the development, maintenance and cleaning of the school site

b) Operational Responsibilities

- Organise School photographs for use in school and in promotional materials
- Oversee School catering service provision, including line management of the Catering Manager
- Oversee School maintenance and cleaning service, including line-management of the Site Manager
- Oversee the operation and development of the School's IT Network, school website and the school's use of social media, through the line management of the IT Network Manager
- Co-ordinate the design, construction and printing of the School Prospectus

c) Policy Responsibility

- Acceptable User Policy
- Allergen Policy
- Charging Policy
- Data Protection Policy
- Health and Safety Policy
- Loaning Students Money Policy
- Supporting Students with Medical Conditions Policy
- Nutrition Policy
- Pay Policy
- Privacy Notices

Note

The above duties are subject to the general roles and responsibilities contained in the Statement of Conditions of Employment.

Whilst every effort has been made to explain the main duties and responsibilities of the post, each individual task undertaken may not be identified. Employees will be expected to comply with any reasonable request from the Headteacher to undertake work of a similar level that is not specified in this job description. The school will endeavour to make any necessary reasonable adjustments to the job and the working environment to enable access to employment opportunities for disabled job applicants or continued employment for any employee who develops a disabling condition.

This job description allocates duties and responsibilities but does not direct the particular amount of time to be spent on carrying them out and no part of it may be so construed. It is not necessarily a comprehensive definition of the post and will be reviewed annually. It may be subject to modification or amendment at any time after consultation with the post holder and the duties may be varied to meet the changing demands of the school at the reasonable discretion of a Headteacher.

This job description does not form part of the contract of employment. It describes the way the post holder is expected and required to perform and complete their particular duties.



Person Specification

	CRITERIA	ESSENTIAL (E) DESIRABLE (D)		WHERE ASSESSED
		E	D	
A	EDUCATION, QUALIFICATIONS & TRAINING			
1	Educated to degree level or equivalent	✓		A,C
2	School Business Professional with a minimum of 5 years of relevant financial management experience or professional accounting qualification, eg. ACA, ACCA, CIMA, CIPFA, AAT or equivalent	✓		A, I, C
3	Qualification in Education Leadership – eg. DSBM		✓	A,C
4	School Resource Management Accreditation		✓	A, I, C
B	PROFESSIONAL KNOWLEDGE & EXPERIENCE			
5	Senior financial management experience in the public or private sector, involving a high level of complexity	✓		A, I, R
6	Experience of effective strategic resource management to achieve educational priorities and ensure efficiency and value for money	✓		A, I, R
7	Significant experience of managing budgets, working with staff and Trustees to develop strong systems to underpin this	✓		A, I, R
8	Knowledge and experience of using financial management systems and generating management accounts	✓		A, I, R
9	Experience of working with external agencies & professional advisors (eg DfE, local authority, auditors)	✓		A, I
10	In depth knowledge of statutory requirements, procedures and regulatory requirements associated with academy trusts	✓		A, I
11	Experience of operating efficient and compliant payroll and pensions systems	✓		A, I

Key: A = Application, C = Certificates, I = Interview, R = References



	CRITERIA	ESSENTIAL (E) DESIRABLE (D)		WHERE ASSESSED
		E	D	
12	Knowledge and experience of managing procurement processes and contract negotiations	✓		A, I
13	Can demonstrate entrepreneurial/innovative thinking, leading to further income generation opportunities		✓	A, I
14	Strong technical ability, able to understand and deploy Integrated Curriculum and Financial Planning (ICFP) tools		✓	A, I
15	Experience of, and skills in, the use of a range of KPI's to evaluate and drive improvements and efficiencies in financial management	✓		A, I
16	Effective planning and organisation skills – able to prioritise tasks, make decisions and manage time effectively	✓		A, I, R
17	Able to interpret complex financial information and statutory advice/guidance and use this to devise policy and practices across the school	✓		I
18	Commits to keeping abreast of changes in school funding landscape – able to anticipate how these might affect the Trust and to keep SLT colleagues & Trustees informed/prepared re these	✓		A, I
19	Persistently champions the school, living by its values and working to secure best value in all financial and commercial matters	✓		A, I, R
20	Able to view risk management from a commercial and financial perspective and to create/adapt strategies to mitigate risk	✓		A, I
21	Experienced in embracing technological advancements and using these to enhance professional practice		✓	A, I
C	PERSONAL QUALITIES & ATTRIBUTES			
22	Trustworthy, able to act with integrity and ethically at all times	✓		A, I, R

Key: A = Application, C = Certificates, I = Interview, R = References

	CRITERIA	ESSENTIAL (E) DESIRABLE (D)		WHERE ASSESSED
		E	D	
23	Excellent numeracy, verbal and written communication skills, with attention to detail	✓		A, I, R
24	Adaptable and flexible	✓		I
25	Analytical problem solving capability, with well-developed emotional intelligence, judgement and political awareness	✓		I
26	Highly effective communication skills, with ability to influence and negotiate effectively	✓		I
27	Personable, but principled style of leadership and contextual, pragmatic understanding of resource management	✓		A, I
28	Reflective practitioner, willing to take responsibility for own self-development and able to inspire, motivate and challenge others	✓		I, R
29	Has stamina and resilience - is able to remain positive and enthusiastic whilst working under pressure	✓		I, R
30	Understanding of and a passion for education, with a strong moral purpose	✓		A, I

Key: A = Application, C = Certificates, I = Interview, R = References



How to Apply

Please apply by completing the School's Application Form, which can be found here:
<https://www.testwoodschool.co.uk/vacancies/support-vacancies/>

Please ensure all boxes are completed and a full chronology of employment included. Incomplete applications will not be considered for shortlisting.

For completeness you will note, as part of the application, that you are required to:

1. **Write a personal statement of no more than 1000 words demonstrating how your knowledge, skills and experience meet the person specification criteria. You should try to provide specific examples or evidence of how this has prepared you to serve as Chief Financial Officer for Testwood School.**
2. **Provide two professional referees, one of whom should be your most recent or current employer. References will be taken up shortly after shortlisting and prior to interview, using the contact details supplied on your application form.**

Please note CVs and other application forms are not acceptable.

Testwood School is totally committed to safeguarding children. Successful candidates will undergo an Enhanced DBS check and prudent checks will be made of references and employment history. The School is also absolutely committed to ensuring this recruitment process is fair and transparent.

Your completed application form and statement should be returned via email to Mrs Sancha Maggs at: sancha.maggs@ascl.org

Closing date for applications: No later than 20 March 2025 at 12 noon
 All applications will be acknowledged on receipt.

The schedule will be as follows:

Closing date:	20 March 2025 at 12 noon
Shortlisting:	25 March 2025
Shortlisted candidates notified:	26 March 2025
Assessment & Interview date:	3 April 2025

Further information about the School can be found on the School website at:
www.testwoodschool.co.uk

In addition to this, you are welcome to undertake a pre-application visit to the school. Please contact **Sancha Maggs** on the aforementioned email address or on **07771 641751** to arrange this or discuss any other application queries you might have.