



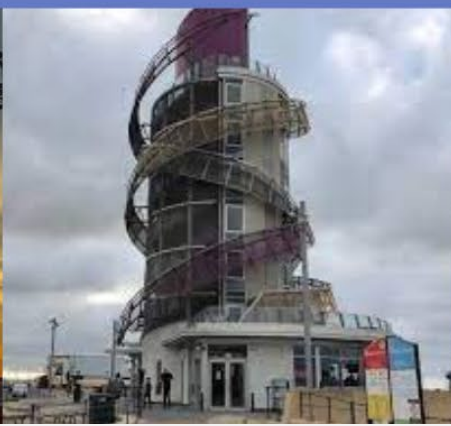
# Deputy Chief Finance Officer and Head of Operations

————— *'To transform children's life chances.'* —————

Job Ref: TVE362



**TEES VALLEY  
EDUCATION**  
[www.teesvalleyeducation.co.uk](http://www.teesvalleyeducation.co.uk)





# Introduction

## Tees Valley Education's foundation and journey to date

Tees Valley Education Multi-Academy Trust (TVEd) was established in 2015, building on five years of successful collaboration between Brambles and Pennyman Primary Academies. This partnership laid the foundation for a trust committed to excellence in education and community impact. Later that year, Dormanstown joined the trust, further strengthening its reach and capabilities. In 2018, Wilton Primary Academy became part of the trust, marking another significant milestone in its growth.

That same year, TVEd proudly opened Discovery Special Academy, the first free school in Middlesbrough, providing tailored education to children with special educational needs. In August 2022, Discovery Special Academy transitioned into a state-of-the-art, purpose-designed building, enabling the expansion of its provision to include secondary-age children.

2025 is a milestone year for the Trust as it proudly marks its 10th anniversary. Over the past decade, the Trust has dedicated itself to fostering positive change and making a meaningful impact in the community. This special anniversary offers an opportunity to reflect on its achievements, celebrate the partnerships and support that have made them possible, and renew its commitment to building a brighter future. The Trust looks forward to continuing its journey towards leaving a 100-year legacy of innovation, growth, and service for generations to come.



# Letter From Katrina Morley OBE

- Chief Executive Officer  
Tees Valley Education Trust



Dear Applicant,

Thank you for expressing your interest in joining Tees Valley Education Trust.

At Tees Valley Education Trust, we hold a steadfast belief that excellence is a birthright. Every child, regardless of their circumstances, deserves access to a world-class education. Our academy Head Teachers operate in an atmosphere of trust, honesty, and integrity, underpinned by an unwavering commitment to excellence for all children and young people. As a Trust, we embrace a philosophy of “no excuses or barriers” in education, ensuring that every child has the opportunity to thrive.

Our academies are located in areas of significant deprivation, and we are passionately committed to the transformative power of education in changing lives. By joining us, you will become part of a brilliant and dedicated team. Across our Trust, all staff—regardless of role—work together with a shared vision: to transform children’s life chances.

We are equally committed to supporting our staff. At Tees Valley Education Trust, we ensure that our leaders and teachers have the time and resources to fulfill their professional duties and responsibilities. We offer a vibrant, supportive, and friendly atmosphere where you will be encouraged to develop both personally and professionally.

Enclosed with this recruitment pack, you will find the job advert, job description, person specification, safeguarding information, and guidance on how to apply. If you wish to apply, please ensure that you complete the application form in full. Kindly note that we do not accept curriculum vitae; only information provided in the application form will be considered.

Thank you once again for considering a position with Tees Valley Education Trust. We look forward to receiving your application.

Yours faithfully,

A handwritten signature in black ink, appearing to read 'Katrina Morley', written in a cursive style.

Katrina Morley OBE  
Chief Executive Officer  
Tees Valley Education Trust



# Mission & Values

## Mission

Our mission is to deliver educational excellence for all of our children by fostering a culture of creativity, curiosity, care, courage and commitment.

## Vision

*'To transform children's life chances'*



## Diamond Standards



### Commitment

To be dedicated, hard working and always try our best.



### Courage

To be adventurous, bold and brave



### Care

To be kind to ourselves, each other and our communities.



### Curiosity

To be inquisitive, excited and explore.



### Creativity

To use our talents to imagine, innovate and inspire.



# TVEd Staff Charter



Complimentary refreshments for staff



Free annual flu vaccination available for all staff upon request



Trust and academy deadlines are publicised well in advance



Sensible pragmatic approach to data collections



Dedicated planning, preparation and assessment (PPA) for all teaching staff



Wellbeing service free for all staff including counselling, life style support and medical referrals



Dedicated space for teaching and learning



Open door policy



A range of staff social, sports and fun sessions including team celebrations



Opportunities for professional development through excellent CPD support



Constructive and research based approach to drop ins and lesson observations within a learning community



Communication policy to protect time outside of the academy



On site parking



End of term team celebration events



Diamond Standards to celebrate all staff who have excelled in one if not all of the SC's



Dedicated staff room and facilities



Always well informed with all elements of school life through regular communications



Staff are recognised for their over and above contribution they make in line with existing policies

## ADVERTISEMENT

**Job title:** Deputy Chief Finance Officer and Head of Operations

**Status:** Permanent

**Required:** Monday 20<sup>th</sup> April 2026

**Salary:** NJC SCP 44 – 47, £55,747 - £59,886

**Hours:** 37 hours (full time), whole time role (annual leave\* allocation of 29 days + 8 public bank holidays)

**Reporting to:** Director of Finance, Resources and Operations and Headteacher at Pennyman Primary Academy

**Academy:** Central team including work at Pennyman Primary Academy

(Applications are welcome from both external and internal candidates. Considerations would be made around the working practices including start date timings for the right candidate)

**Are you looking for a new challenge where you can join a thriving team? Are you an experienced, credible and an inspiring leader that wants to make a difference and contribute to children's outcomes as well as the growth of the whole trust? Please apply today.**

### About the Trust

The Trust was established in 2015 and provides education and enrichment activities to more than 1100 children across five Academies, located in Middlesbrough and Redcar and Cleveland local authority areas. Academies within the Trust are:

- Brambles Primary Academy (2 to 11 years),
- Discovery Special Academy (2 to 16 years),
- Dormanstown Primary Academy (2 to 11 years),
- Pennyman Primary Academy (2 to 11 years), and
- Wilton Primary Academy (3 to 11 years).

### What we are looking for:

This is a new role with the aim to increase both capacity to the trust's central team and in Pennyman Primary. As a result, the Trust is seeking to appoint a talented individual who will bring expertise that will enhance the Trust's workforce with a sound understanding of managing operations in schools and across a trust. This includes a good understanding of financial management, health and safety, estates, recruitment and HR processes. We are keen to receive applications from dynamic, gracious disruptors that are positive, solution focussed and have strong and effective communication skills particularly within SEND (Special Educational Needs and Disabilities).

This role requires someone who thrives on tackling challenges, finds interest in the complexities of Trust and academy operations - is committed to developing effective, forward-thinking solutions. You will support the Director of Finance, Resources and Operations (DFRO) with financial and risk management – support the academies on estates and premises as well as supporting with Trust wide compliance including reporting to senior leadership team and trustees as required. The role will also be to fine-tune operational strategies, and ensure that we are always responsive to the evolving demands of the sector.

With over 1100 children across the Trust including 165 specialist SEND places of which 55 unit places for children with complex medical needs are situated at Pennyman Primary, you will have the opportunity to see the tangible impact of your work every day. The positive, transformative influence you will have on our academy community offers a unique sense of job satisfaction.

If you are looking for a role in a nurturing, inclusive environment that places a high value on children's outcomes and staff wellbeing, working at Tees Valley Education could be the ideal place for you.

The role will be an integral member of the Trust's Business Team and will be located 2.5 days in academy and 2.5 days in central, however, this may change depending on the workplan and priorities. During academy holidays, to support with business continuity, the role along with SABMs are required to work at central Trust on a rota basis.

**What the Trust will provide the successful candidate with:**

- A workplace where all staff are valued and treated with respect as outlined within the Trust's Diamond Standards
- A passionate, enthusiastic and supportive leadership team
- A listening and learning organisation where all staff are encouraged to be curious and share ideas for the trust/academies/team to improve
- Hard working, committed and dedicated staff who strive to gain the best outcomes for all children across the Trust's academies
- Dedicated approach to children's learning to encourage them all to be the best they can be
- Career enhancement opportunities within areas of interest as well as supporting ongoing professional development and training specific to job role
- Dedicated line manager to discuss work streams and capacity
- Free access to the Trust's Wellbeing offer, which includes counselling, access to GP, Mindfulness and so much more.
- Free parking
- Enrolment into the local government pension scheme
- All support contracts are employed on National Joint Council (NJC) for local government services (also known as Green book)
- Benefits of the Trust's Staff Charter which can be found at [TVED Staff Charter](#).

**Safeguarding requirements for the role:**

Tees Valley Education Multi Academy Trust is committed to safeguarding and promoting the welfare of children. All appointments will be subject to a satisfactory enhanced DBS check.

This post is exempt from the Rehabilitation of Offenders Act 1974 and, therefore, all convictions, cautions and bind-overs, including those regarded as "spent" must be declared. The Trust's Recruitment of Ex-Offender policy can be requested or visit the Trust's website.

Applications are invited from prospective candidates who demonstrate that they are able to meet the essential criteria set out in the person specification and who have the vision, values and tenacity to join an outstanding team and help continue the journey towards excellence.

## JOB DESCRIPTION

The role is required to work across more than one academy with the main locations being at central site and Pennyman Primary Academy. It will be to support the DFRO with providing operational leadership and professional management across the whole trust operations including financial, estates, HR, payroll, health and safety, GDPR, ICT and Governance at both academy level and across the Trust, through supporting academy and trust Senior Leadership Team.

## DEPUTY CHIEF FINANCE OFFICER RESPONSIBILITIES

### FINANCE & STRATEGIC RESPONSIBILITIES

- Demonstrate effective deputisation for the CFO as required.
- Ensure strong leadership and management of trust-wide operational and delivery functions.
- Support in ensure the accurate preparation and submission of DfE financial returns, including internal and external reporting requirements.
- With the DFRO review trust monthly management accounts to ensure accurate accounting treatment.
- Implement the production of consolidated trust budgets and three-year forecast outturns for submission to the DfE.
- Identify and lead on all non-government grant income, including grants and self-generated income, contributing to the effective business development of PLACE.
- Implement oversight of complex local authority grants (e.g. Early Years, CLA, High Needs Top Up) by working closely with academy personnel.
- Maintain robust month-end processes, including the accurate identification and treatment of fixed assets.
- Review VAT returns are calculated accurately and submitted to HMRC in a timely manner.
- As directed produce leadership reports for the Trust Board, including cash flow and balance sheet reporting.
- Monitor effective resource allocation in partnership with academy leaders.
- Maintain and improve financial systems and procedures across academies, including year-end processes.
- Implement participation in the management of key trust projects as directed by the CEO.
- Ensure strategic financial direction within the Trust's senior leadership team in collaboration with the CEO and DFRO, securing financial compliance across the Trust
- With the DFRO ensure accurate preparation, input and maintenance of financial data, including journals to protect ledger and fund integrity.
- Review auditor findings and implement improvements to strengthen financial management and internal controls.
- Provide financial support and guidance, including contributing to grant applications and funding bids.
- Maintain a strong understanding of SEND funding and the national SEND landscape.
- Ensure effective oversight of academy insurance claims (e.g. staff absence, motor and RPA) in line with Trust policies.
- Apply regulatory requirements effectively at both academy and trust level within a complex operating environment.
- Improve knowledge and skills in commerce, start-ups or scale-up business models (or demonstrate willingness to learn), particularly in support of PLACE.



- Ensure Trust-level strategy and policy development includes engagement with all relevant stakeholders.
- Review due diligence processes for new schools joining the Trust, including long- and medium-term financial planning.
- Achieve value for money across all Trust activities, including service delivery and procurement.

## **HEAD OF OPERATIONS – MAIN RESPONSIBILITIES**

- Maintain active membership of the Trust Business Leadership Team.
- Support the DFRO in strategic development, business planning, operational delivery, performance standards and regulatory compliance across facilities and estates.
- Implement management protocols for all building services, plant, equipment, structures and fabric, ensuring board-level assurance.
- With the Trust Executive Team design, develop and implement trust-wide operations ensuring they consider the needs of children and young people across the Trust.
- Contribute to the Trust's sustainability strategy with the DCEO, embedding best practice in environmental management.
- Assess and manage operational risks, providing expert advice and guidance on health and safety matters.
- Implement and monitor academy and trust-wide projects, including capital projects, coordinating internal and external stakeholders and managing change effectively, with ABM at academy sites.
- Ensure full accountability for trust-wide health and safety, maintaining compliance with legislative requirements so that all Trust sites are safe for pupils, staff and visitors.
- Share, monitoring of the contract management of SLAs with the DFRO, holding suppliers to account through regular performance meetings.
- Ensure compliance with national DfE guidance, including the Academy Trust Handbook, and all Trust and academy protocols.
- Review and contribute to reports for SLT, the DFRO and relevant Trust Committees.
- Support the DFRO in the ongoing development of Trust strategic handbooks in collaboration with key stakeholders.

## **GENERIC RESPONSIBILITIES**

- Maintain and promote the Trust's values internally and externally.
- Ensure a safe, inclusive and positive culture across the Trust and its academies.
- Achieve consistent delivery of day-to-day duties in line with agreed service levels and Trust ethos.
- Improve quality, systems and processes by acting as a champion for continuous improvement.
- Achieve positive outcomes for pupils through a professional commitment to raising standards and provision.
- Ensure compliance with safeguarding, health and safety, confidentiality and UK GDPR requirements, reporting concerns appropriately.
- Promote equality, diversity and inclusion across all areas of work.
- Contribute to the overall ethos, aims and work of the Trust.
- Maintain constructive relationships with external agencies and professional partners.
- Participate in training, learning and performance development activities as required.

- Identify personal strengths and areas of expertise to support and advise colleagues effectively.
- Undertake any other duties consistent with the grading of the post, as directed by the CEO.

## SAFEGUARDING

- All staff must adhere to the Trust's safeguarding training (appropriate for job role) including policies, procedures, latest Keeping Children Safe in Education guidance and Working Together to Safeguard Children DfE 2018.

## ADDITIONAL RESPONSIBILITIES

- The job holder may be required to undertake additional duties as could be reasonably required in exceptional or emergency situations. These may include:
- to work flexibly between the hours of 8am and 6pm
- to work across the Trust if required.
- to undertake additional training e.g. first aid, Positive Handling.
- to undertake any additional duties as could be reasonably required.
- To ensure holidays are never taken at the same time as the DFRO.

This job description will be reviewed annually and may be subject to amendment or modification at any time after consultation with the post holder. It is not a comprehensive statement of procedures and tasks, but sets out the main expectations of the Trust in relation to the post holder's professional responsibilities and duties.

Elements of this job description and changes to it may be negotiated at the request of either the line manager.

Signed (Employee)		
Date:		
Signed (on behalf of employer):		Name and Role:
Date:		

**Important:** In the first instance, applications are assessed against the following criteria:

\*overall presentation                      \*use of standard English                      \*grammatical accuracy

Where applications do not meet the expected standard, they will be discarded before being matched to the person specification.

## PERSON SPECIFICATION

### Deputy Chief Finance Officer and Head of Operations

QUALIFICATIONS	Office use only
Good standard of education (grade C/4 or above in English and Maths)	E (1)
School Business Management/finance qualification	D (1)
NEBOSH certificate	D (2)
EXPERIENCE	Office use only
Experience of working in an education setting	E (2)
Successful track record in working with senior leaders and stakeholders building trust and confidence	E (3)
Experience of building capacity and managing change across a range of professional functions and support teams.	E (4)
An understanding of financial management across multi-disciplinary functions and of budget formulation, setting and monitoring across a number of disparate bodies	E (5)
Experience of working with senior leaders within a local authority, government department, agency or similar high-profile organisation with comparable scope, responsibilities, budget and resources	D (3)
Experience of Human Resource Management	D (4)
Experience of Arbor, IRIS Financials or similar MIS and finance systems	D (5)
Experience in premises' management, risk assessments and emergency planning	D (6)
KNOWLEDGE AND SKILLS	Office use only
Operational and strategic management skills including responsible for leading teams across the Trust in a fast paced environment. Demonstrating added value in all activities	E (6)
Skills in management and participation in the formulation of policies and strategies within a large multi-discipline organisation	E (7)
Skill in supporting strategic leaders to prepare a budget plan taking into account Value for Money, organisational priorities and factors affecting funding/income	E (8)
Proven skill in maintaining accurate financial information to facilitate effective monitoring to achieve organisational aims	E (9)
Proven skill in presenting complex financial data, effective use of IT and managing workload	E (10)
Identify own professional development needs and ensure they are met	E (11)
Identify and report potential risks to senior leaders	E (12)
Involvement in leading and supporting a project	E (13)
Understanding of Health & Safety issues relevant to the post	E (14)
Understanding the importance of confidentiality and an appreciation of the implications of the GDPR and Data Protection Act	E (15)
QUALITIES	Office use only
An inspirational leader, visionary and visible; able to lead by example. Empowering, enabling, motivating and developing others	E (16)
A highly effective communicator with strong influencing skills, able to inspire confidence and trust at all levels.	E (17)
Hardworking, resilient, determined, reliable, honest and committed with a sense of humour.	E (18)
Commitment to working flexibly and co-operatively within a team	E (19)
Actively promotes equality of opportunity for all	E (20)
A strategic operator with the tenacity and personal drive to deliver continuous performance improvements and lead transformational change.	E (21)



AM (Assessment Method), A- Application Form, I – Interview, R – Reference,

E – Essential,

D - Desirable

**Important:** In the first instance, applications are assessed against the criteria listed above, in addition to overall presentation, use of standard English and grammatical accuracy.

Where applications do not meet the expected standard, they will be rejected before being matched to the person specification.

## HOW TO APPLY AND EXPLANATORY NOTES OF THE PROCESS

An application form is attached below. Application packs can be downloaded or printed directly from the Trust website [www.teesvalleyeducation.co.uk](http://www.teesvalleyeducation.co.uk) or requested from the academy. Only applications via the Trust's official application form will be accepted. Please do not submit a CV as substitute for part or full application form, the information will not be accepted or considered.

If you are submitting your completed application form by e-mail to [recruitment@tved.org.uk](mailto:recruitment@tved.org.uk) - please be aware the academy cannot be responsible for any formatting anomalies when printing. If you are unable to submit an electronic application form, hand written or electronic printed copies should be posted or hand delivered to the following address for the attention of Katrina Morley OBE, Chief Executive Officer.

Tees Valley Education  
C/O Pennyman Primary Academy  
Bungalow  
Fulbeck Road  
MIDDLESBROUGH  
TS3 0QS

### Shortlisting Process

After the closing date, short listing will be conducted by a panel, who will match your skills/experience against the criteria in the Person Specification. You will be selected for interview entirely on the contents of your application form, so please read the Job Description and Person Specification carefully before you complete your form.

### Shortlisted candidates will receive:

- Letter confirming interview details.
- Details of original ID documentation is required to confirm candidates. Photocopies or certified copies are not accepted.
- Criminal Record Self-Declaration Form, which must be brought on the day of the interview in the sealed envelope provided.

## **References for successful Candidate/s**

We may seek references for shortlisted candidate/s, we may also approach previous employers for information to verify particular experience or qualifications before the interview. Finally, we may also undertake a social media search in accordance with Keeping Children Safe in Education guidance. Any relevant issues arising from references will be taken up post interview.

## **Interview process**

In addition to candidates' ability to perform the duties of the post, the interview will also explore issues relating to safeguarding and promoting the welfare of children, including:

- Motivation to work with children and young people
- Ability to form and maintain appropriate relationships and personal boundaries with children and young people
- Emotional resilience in working with challenging behaviours
- Attitudes to use of authority and maintaining discipline

## **Conditional Offer: Pre-Employment Checks**

Any offer to a successful candidate will be conditional upon:

- Verification of right to work in the UK
- Receipt of at least two satisfactory references (if these have not already been received)
- Verification of identity checks and qualifications
- Satisfactory enhanced DBS check
- Verification of professional status such e.g. QTS Status, NPQH (where required)
- Satisfactory completion of a Health Assessment
- Satisfactory completion of the probationary period (where relevant)
- Where the successful candidate has worked or been resident overseas in the previous five years, such checks and confirmations as may be required in accordance with statutory guidance.

Please contact the academy office on 01642 221156 to arrange a visit to the academy and central team. For your information, the recruitment timetable is detailed below:

**Closing date:** Tuesday 17th February 2026 @ 12pm

**Shortlisting date:** Tuesday 17th February 2026 @ 3pm

**Interview date:** Tuesday 3rd March 2026 @ 1pm

**Contract Start Date:** Monday 20th April 2026 or as soon as possible (or negotiable for the right candidate).

## **General Data Protection Regulation**

Refer to our privacy policy on how we will process your personal data including how you can request to access your personal data via Tees Valley Education website:  
<http://www.teesvalleyeducation.co.uk>.

## EQUALITIES INFORMATION AND OBJECTIVES STATEMENT

As an academy we ensure that our vision, values and ethos meet the expectations of the equality and diversity guidelines and legislation set out by the Equality and Human Rights Commission. This includes the following 9 protected characteristics:

1. Age
2. Disability
3. Gender Reassignment
4. Marriage and Civil Partnerships
5. Pregnancy and Maternity
6. Race
7. Religion or belief
8. Sex
9. Sexual Orientation

### **Objectives Statement**

- To support children's sensory, academic and communication skills to enable them to develop holistically.
- To ensure high expectations across all aspects of the academy (as outlined in objective 1) to ensure children make the best progress according to their individual starting points.
- To continue to monitor attendance of all groups of children in the academy.
- To review levels of parental and pupil engagement in learning and academy life, across all activities and ensure equality and fairness in access and engagement.
- To ensure the academy environment is as accessible as possible to pupils, staff and visitor.





**TEES VALLEY  
EDUCATION**

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