



Candidate brief for the position of **Trust Finance Director** at Lumero Educational Trust

Application Deadline: 3pm on Wednesday 28th October 2026





Dear Applicant

Thank you for expressing an interest in working in our Trust. This pack tells you more about our Trust, the role of Trust Finance Director and the person we are looking for.

As a Trust, we comprise of eight primary schools, four secondary schools and a Shared Services Team located across the London Boroughs of Bromley and Croydon, as outlined on the next page.

Our overarching aim for all our schools is **learning together, inspiring all**. We are committed to **excellence**, having great aspirations for our children and young people, and encouraging them to seek out and take hold of opportunities. Our drive for excellence is supported by our **collaboration**, and we are committed to sharing expertise to empower and inspire all individuals in our schools to thrive in a global world. This is underpinned by **inclusion**. We celebrate and respect the diversity in our communities, and we have a shared expectation in everyone to achieve in an ever-changing world.

This is an exciting opportunity for a motivated and passionate individual to join our Shared Services team and make a real impact upon our staff and students, helping to shape their future.

This post is available as soon as possible and would suit someone who is hardworking, passionate about state education and keen to work in an aspirational educational trust.

Please complete the application form as fully as possible.

We very much look forward to hearing from you.

Yours sincerely

A handwritten signature in dark ink, appearing to read "T Millar".

Terry Millar
Chief Executive



Our Schools



BIGGIN HILL
PRIMARY SCHOOL



BULLERS WOOD
SCHOOL FOR BOYS



BULLERS WOOD
SCHOOL FOR GIRLS



CHARLES DARWIN
SCHOOL



CHELSEFIELD
PRIMARY SCHOOL



CHISLEHURST
SCHOOL FOR GIRLS



DARRICK WOOD
JUNIOR SCHOOL



GREEN STREET GREEN
PRIMARY SCHOOL



THE HIGHWAY
PRIMARY SCHOOL



ORCHARD WAY
PRIMARY SCHOOL



TUBBENDEN
PRIMARY SCHOOL



PRATTS BOTTOM
PRIMARY SCHOOL



Trust Finance Director

Job Title:	Trust Finance Director
Location:	Based in Chislehurst but working across all Lumero Schools
Reports to:	Chief Finance and Operating Officer
Working with:	Headteachers, Senior Leaders and Finance Managers
Salary:	NJC PO11 (54-57) £72,289-£76,029
Working Hours:	Full time, 36 hours a week, 52 weeks a year
Contract Type:	Permanent
Date:	ASAP

Job Purpose:

The Finance Director will play a pivotal role in supporting the CFOO by providing operational leadership and financial management across the Trust. The postholder will lead day-to-day finance activity, with a particular focus on the secondary phase schools and shared services, while providing oversight of primary phase finance. Working within the strategic financial framework set by the CFOO, the Finance Director will oversee financial planning, compliance, reporting and risk management across all academies within the Trust ensuring robust financial controls are in place and that key financial risks and issues are escalated appropriately.

Key Responsibilities

- Support the CFOO in the development, implementation and delivery of the Trust's financial strategy, ensuring alignment with the Trust's educational priorities and long-term sustainability.
- Lead finance activity for the secondary phase schools and shared services team, including preparation of annual budgets, forecasts and financial plans, and direct line management of the secondary school finance managers.



- Provide oversight of primary phase finance through line management of the Head of Primary Finance, operating within the strategic financial framework and overall oversight of the CFOO.
- Ensure the timely preparation and submission of all statutory financial returns, including Budget Forecast Returns and other Department for Education (DfE) requirements
- Oversee financial reporting, ensuring accuracy, timeliness, and compliance with the Academies Trust Handbook and DfE requirements.
- Lead and manage the Trust's finance team, providing guidance to finance managers and senior leaders while fostering high performance and continuous improvement.
- Ensure effective financial controls, policies, and procedures are in place and adhered to.
- Monitor financial performance and provide insightful analysis to support decision-making.
- Support capital projects, including financial planning and reporting for estates and infrastructure developments.
- Contribute to risk management processes, including financial risk assessments and mitigation strategies.
- Monthly GAG transfer statement preparation for all schools, along with raising BACs/account transfers/posting requirements for other schools. Distribution of DfE remittances and filing.
- Coordinate the operational delivery of statutory external audit requirements, acting as the main day-to-day contact for auditors and escalating key issues to the CFOO as required. Second in charge for internal audit
- Central Bank Account Coordination. Ensure that all schools move to agreed banking platform and manage all signatory information and banking controls .
- Ensure implementation of all Chart of Account changes, Policy and Procedures
- Lead communications to finance managers on changes to Access, Chart of Accounts, Financial Policy Changes and preparing draft Financial Policies and Procedures (FPP) annual updates.
- Collect information from respective schools for audit reporting, and other statutory reports.
- Pensions audit co-ordination.
- Provide support for finance training across our schools and shared services
- Deputise for CFOO when necessary (finance committee, audit committee)



- Lead the continuous development of the finance function, promoting high standards of performance, customer service, professional development and continuous improvement.

This is a not definitive list of responsibilities as the CFOO may need to delegate key responsibilities when support is needed.

Person Specification

Essential:

- Qualified accountant (ACA, ACCA, CIMA or equivalent).
- Proven experience in a senior finance role, ideally within the education or public sector.
- Strong understanding of financial regulations relevant to educational trusts (e.g., Academies Trust Handbook).
- Excellent leadership, communication, and interpersonal skills.
- Ability to manage complex financial information and present it clearly to non-financial stakeholders.
- High level of integrity and commitment to the Trust's values and mission.

Desirable:

- Experience working within a multi-academy trust or similar organisation.
- Knowledge of financial systems used in education (e.g., Access, PS Financials, Sage).
- Experience in managing capital projects and funding streams.



Benefits

- Generous Local Government Pension Scheme employer's contribution of 17.4%
- Generous annual leave entitlement of 28 days.
- A supportive Employee Assistance Programme
- Professional development opportunities.
- Flexible working arrangements.
- Collaborative and supportive working environment.

Application Process

How to apply

Applicants should complete the Trust application form and submit it to hr@lumero.org by 3pm on Wednesday 28th October

If you would like to discuss the role then please contact our HR Director Wendy Andrews on WAndrews@lumero.org

Interview Process

Candidates will be shortlisted, and successful candidates will be interviewed on **5th November**. However, we reserve the right to interview and appoint to this position before the advertised closing date. Applications will therefore be considered as they are received, and interested candidates are encouraged to apply at the earliest opportunity. Should an exceptional candidate be identified, the vacancy may be closed early.

- i. Suitable applications will be shortlisted for interview as quickly as possible.
- ii. If you are successful, you will receive a phone call followed by an email inviting you to attend for interview. It is therefore important that you give us a daytime telephone number and an email address that you regularly access so that we can contact you to make the necessary arrangements if you are shortlisted.

If you require any assistance in attending for interview, please let us know the nature of that assistance in good time so that we may make appropriate arrangements.



iii. Candidates called to interview will

- have an opportunity to meet with staff.
- be expected to conduct a task to test areas required as per the person specification.
- attend a panel interview.

We are an equal opportunities employer and are committed to fostering a diverse, inclusive culture. We particularly encourage applications from candidates from backgrounds currently underrepresented in our staff body.

Pre-employment Checks

Lumero Educational Trust is committed to safeguarding and promoting the welfare of children and young people and expects all staff to share this commitment. Any appointment will be subject to satisfactory enhanced disclosure from the Disclosure and Barring Service. Please note that an enhanced check will reveal all criminal convictions on record, including those that might be considered “spent”.

The successful applicant will also be required to:

- Provide details of two referees who know them in a professional capacity. It is policy to take up references BEFORE interviews where possible. Employment is conditional on these references being deemed satisfactory.
- Provide proof of all relevant qualifications.
- Provide proof of eligibility to work in the UK
- Complete a Medical Declaration and receive fitness to work.

Policy on Equal Opportunities

The Trust is an Equal Opportunities employer and appointments are based on the applicant’s ability to meet the requirements of the position. The Trust is opposed to any form of discrimination against any individual or group and welcomes the fact that our Trust includes a diversity of individuals from many races and cultures. Behaviour, which is discriminatory on the grounds of race, colour, culture, nationality, gender, sexual orientation, disability, religion, will not be tolerated.



Lumero Educational Trust

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