

# Chief Finance Officer Recruitment Pack

**Full Time (52 weeks per year)**

**Start date: April 2026**



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## **WHAT WE WOULD LIKE YOU TO SHOW US IN YOUR APPLICATION**

What skills, knowledge and experience do you have?  
Are you the right person for our organisation and team?  
What is your evidence base and track record?

*'Work together, learn together, succeed together'*

# Welcome from the Chief Executive Officer

Dear Applicant,

I am delighted that you are interested in finding out more about joining the Agora Learning Partnership; a multi-academy trust that currently consists of ten primary schools located across Hertfordshire, served by a supportive and dedicated central team.

The Chief Finance Officer (CFO) position offers the successful applicant an exciting opportunity to be part of the Trust's future, where collaboration and partnership are believed to be the key to its success. The Agora is a place where we 'work together, learn together, succeed together'.

This role will appeal to an ambitious and enthusiastic professional, motivated by the opportunity to impact positively on children's outcomes, Partnership-wide. The position will suit an individual who can lead and manage all financial aspects of the Trust's work and play a lead role in setting the Trust's strategic direction. The CFO will have the opportunity to drive change within the Trust's finance function and its Academies; to bring greater efficiency and effectiveness in the way the Trust carries out its business.

The CFO will be required to:

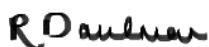
- Ensure the finance service underpins the Trust's work, resulting in improved outcomes for children
- Take responsibility for the financial performance of the Trust and ensure the Trust remains financially viable
- Ensure the appropriate use of public funds and financial compliance, Trust-wide
- Oversee the delivery, evaluation and development of the Trust's finance function, including the finance service provided to the Trust's Academies
- Play a full and active role as a member of the Agora Learning Partnership's Leadership Team
- Be accountable to the Trust Board and support Trustees to make informed financial decisions

If you believe you would make a positive addition to our supportive, professional and friendly team, and that you can lead improvement in the Trust's operations, then we look forward to receiving your application.

I hope you find the information in this recruitment pack useful; however, if you have any further questions, or if you would like to discuss the role in more detail, please do not hesitate to contact me via email ([HR@agoralearning.co.uk](mailto:HR@agoralearning.co.uk)).

I look forward to hearing from you.

Kind regards



**Rebecca Daulman**  
Chief Executive Officer

# Agora Learning Partnership's Vision and Aims

In ancient Greece, the word 'Agora' was used to describe a public open space used for assemblies and markets; Agora, a place where people could be together. As such, working together and learning together are fundamental to achieving our vision.

At the Agora Learning Partnership, we believe in the power of collaboration to improve the life chances of children and young people, whilst enabling them to flourish and achieve the very best outcomes in all aspects of school life and beyond. This belief underpins the vision for our organisation.

For such collaboration to be a success, our staff will have a variety of skills, knowledge and expertise; supported through the connection and development of our staff groups, Partnership-wide. We strive to be the employer of choice, so that we can recruit, develop and retain talented individuals who are suited to the schools and the children they serve.

Furthermore, we aspire for carefully planned collaboration, with the Partnership and beyond, to be the driving force for school improvement and strive for a self-improving, self-sustaining system. We believe this, alongside our 'local decisions for local children' approach, will support ongoing improvement in schools and will result in the children and young people we serve being offered a first class, enriched education that is fully inclusive; we will meet the needs of every child, preparing them for future life.

We will work to drive improvement, across our Trust community, through the Together Strategy which underpins the four pillars of the Trust's work; finance, operations, education and people. We understand that each of the Partnership schools has a unique identity. We will continue to work hard to engage with each school community to ensure the needs of each school community are met in order that all our schools are the schools of choice in their local area. Also, throughout our whole Partnership, we will work to provide a welcoming, safe and respectful environment; an environment where diversity is embraced and celebrated and where there is equity of opportunity for all.

## Aims:

- To work together to improve the life chances of children.
- To enable all children to flourish and achieve the very best outcomes in all aspects of school life and beyond.
- To be the employer of choice to recruit, develop and retain talented individuals.
- To achieve ongoing school improvement by implementing the Partnership's self-improving and self-sustaining system, underpinned by collaborative-working opportunities.
- To continue to implement a 'local decisions for local children' approach in order that all children receive a first class, enriched education that is fully inclusive.
- To drive improvement, across our Trust community, through the Together Strategy which underpins the four pillars of the Trust's work; finance, operations, education and people.
- To recognise and promote the unique identity of each school, ensuring the needs of each school community are met and to engage with them, ensuring our schools are the schools of choice in their respective areas.
- To provide a welcoming, safe, and respectful environment, where diversity is embraced and celebrated and where there is equity of opportunity for all.

# Agora Learning Partnership's Together Strategy



## What?

In September 2021, the Agora Learning Partnership launched the Together Strategy. The Strategy details how everybody across the Partnership will work together to secure Trust-wide improvement. The core purpose of the strategy is to enhance, and not replace, the individual work of schools and assist in improving the life chances of the children and young people within and across the Partnership... ultimately helping them to flourish and achieve the very best outcomes in all aspects of school life and beyond.

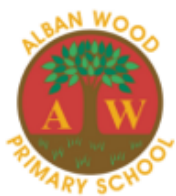
## How?

The Together Strategy contains detail about the strategies that will be employed to achieve ongoing Trust improvement. These strategies are related to four focus areas – Together for Children, Together for Staff, Together for Schools, and Together for Community. A strategic plan has been developed to drive the implementation of these strategies.

## When?

Implementation of the Together Strategy strategic plan commenced in September 2021, the plan has been reviewed and updated annually since that time. The plan continues to be the driving force for Trust improvement.

# Agora Learning Partnership Schools



<b>Alban Wood Primary School and Nursery</b>	<b>Bromet Primary School</b>	<b>Creswick Academy</b>	<b>The Grange Academy</b>
Executive Headteacher: <i>Jonny Spector</i>	Headteacher: <i>Rebecca Whiteman</i>	Headteacher: <i>Rowan Thompson</i>	Headteacher: <i>Craig Maddox</i>

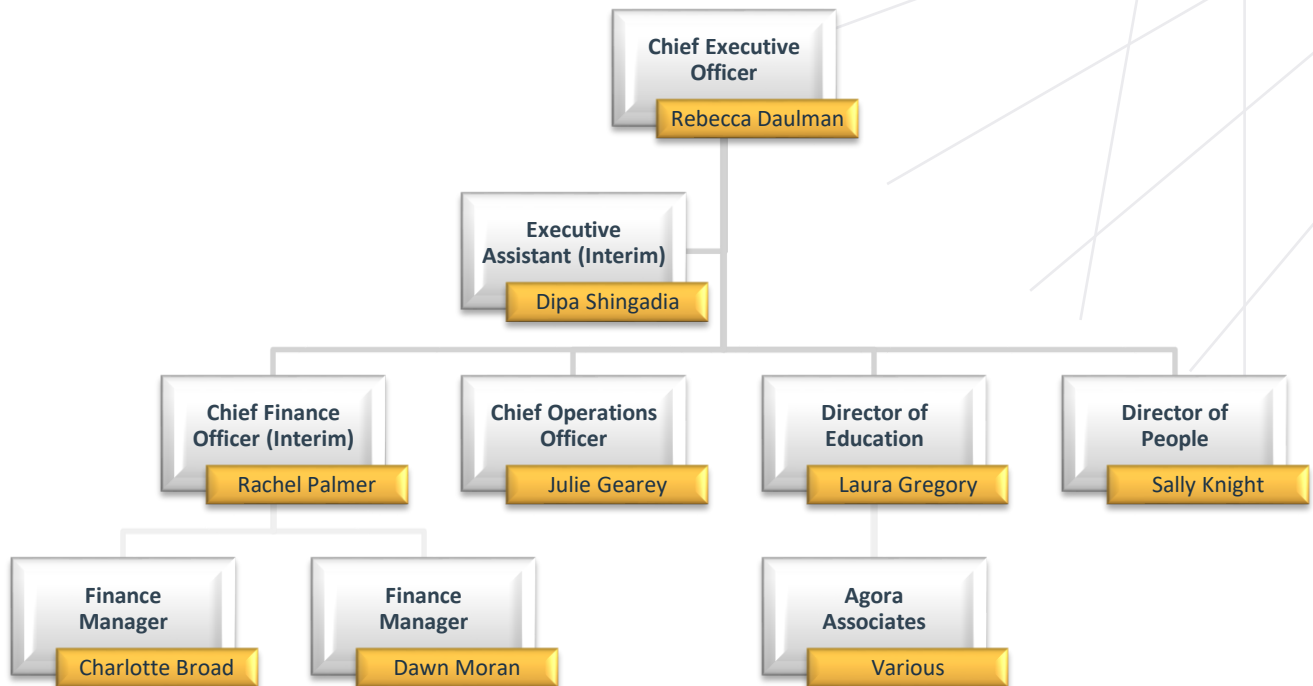


<b>Journeys Academy (Opening 2026)</b>	<b>Meryfield Community Primary School</b>	<b>The Orchard Primary School</b>	<b>Oxhey Wood Primary School</b>
Headteacher: <i>Sheryl Wall</i>	Headteacher: <i>Alex Gage</i>	Executive Headteacher: <i>Jonny Spector</i>	Headteacher: <i>Mikki Caplan</i>



<b>Warren Dell Primary School, including a Specialist Resource Provision</b>	<b>The Acorn Centre</b>	<b>Waterside Academy</b>	<b>Wilbury Junior School</b>
Interim Headteacher: <i>Graham Hodgkinson</i>		Headteacher: <i>Kevin Peart</i>	Headteacher: <i>Chelsea Atkins</i>

# Agora Learning Partnership's Central Team 2026





# Chief Finance Officer

## Job Description

### Chief Finance Officer

This job description details information about the role of the Chief Finance Officer and is subject to review and amendment through annual negotiation as the role develops in scope.

Line manager	Chief Executive Officer
Responsible to	Chief Executive Officer
Location	Hybrid remote working (flexible in time spent in schools/working remotely)

### Core Purpose of the Role:

The Chief Finance Officer will:

- Ensure the finance service underpins the Trust's work, resulting in improved outcomes for children
- Take responsibility for the financial performance of the Trust, ensuring the Trust remains financially viable
- Ensure the appropriate use of public funds and financial compliance, Trust-wide
- Oversee the delivery, evaluation and development of the Trust's finance function, including the finance service provided to the Trust's Academies
- Play a full and active role as a member of the Agora Learning Partnership's Leadership Team
- Be accountable to the Trust Board and support Trustees to make informed financial decisions

### Duties and Responsibilities – Specific:

#### Leadership and Management

The Chief Finance Officer will:

- Take responsibility for financial performance, Trust-wide, at both a strategic and operational level
- Provide strategic vision for all areas of responsibility
- Create strategic plans, based on the strategic vision, to drive improvement in the finance-related aspects of the Trust's work
- Lead and manage effectively to achieve high standards in the Trust's finance function
- Deliver a transparent, professional and financially efficient service, which raises standards whilst providing value for money
- Quality assure the Trust's finance service, taking action to make improvements as required

#### People

The Chief Finance Officer will:

- Lead and manage staff with responsibilities pertaining to finance
- Organise or provide training and support for stakeholders, including staff and governors
- Provide financial advice and guidance to the Trust Board, Leadership Team and Academy leaders
- Build close and effective working relationships with stakeholders and key partners
- Liaise with the funding body on financial matters, on behalf of the Chief Executive Officer
- Be involved in the recruitment of finance-related roles, as required
- Organise and submit an annual Gender Pay Gap Report to the Board

#### Trust Governance

The Chief Finance Officer will:

- Be accountable to the Chief Executive Officer and the Trust Board on all matters pertaining to finance
- Provide high-quality, timely information (including reports as required) to the Trust Board in order to:
  - Ensure the Board has an ongoing, accurate oversight and understanding of the Trust's finances and any related concerns
  - Guide the Board in its finance-related strategic development and financial planning/management



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### ➤ Support the Board to make informed financial decisions

- Play an active role in Board and FARE Committee meetings on finance-related agenda items
- Revise or create new policies and prepare other documents, such as monthly management accounts, as required
- Prepare and deliver an annual internal audit report to the Board
- Provide support to the Academy Governing Boards as required; attending meetings if needed

### **Financial Control**

The Chief Finance Officer will:

- Develop an in-depth working knowledge of the Trust finances and the finances of each of the Trust’s Academies
- Ensure effective financial controls and systems are in place across the Trust and all financial operations comply with the Academy Trust Handbook requirements
- Identify areas for improvement in the Trust’s finance processes, procedures and systems; provide the support and training to make related changes
- Be responsible for the maintenance, control and monitoring of the payroll system; ensure effective use of the system by the Finance Managers and Academy-based finance staff
- Be responsible for the Trust’s budgeting process - set key assumptions for Academies, oversee the budgeting process within the Trust’s Academies and ensure the consolidated budget is in line with the expectations of Trustees
- Develop and own a rolling 5-year financial projection for the Trust, including projections for academies, assumptions around joining schools and central Trust forecasts
- Evaluate bids for additional spend in line with the Scheme of Delegation
- Maintain the Trust’s accounts in accordance with the funding agreement and Academies Financial Handbook issued by the Department for Education and in accordance with the financial regulations and procedures of the Trust
- Ensure reoccurring financial tasks are completed accurately and in a timely fashion; for example, recharges between schools, VAT reclaims, the completion of funding claim forms, raising invoices for services rendered
- Maintain the Trust’s Fixed Asset Register and calculate the depreciation on an annual basis
- Ensure robust and proportionate business continuity plans are in place for the finance function
- Monitor the Trust’s cash flow position and raise any concerns with the Chief Executive Officer immediately
- Coordinate termly internal audit reviews; take action to address identified areas of development
- Carry out internal finance-related checks - highlight any areas of financial concern; address these with the relevant parties and find solutions to avoid future repetition
- Monitor and evaluate the impact of the monthly budget monitoring meetings, carried out by the Finance Managers within each Academy
- Act as the main point of contact for the Trust’s appointed internal and external auditors, facilitate all audit arrangements and implement and monitor audit requirements
- Deliver a set of annual accounts for audit that are of the quality to allow an efficient audit process, with minimal corrections, restatements or qualifications being required, delivered within a reasonable timescale that allows adequate review by the FARE Committee and Board and timely submission of the annual Academies Accounts Return
- Ensure the Trust has effective risk management in place, including identifying strategic and operational financial risks, taking steps to mitigate these risks, and maintaining the Trust’s risk register

### **Trust Procurement, Contracts and Services**

The Chief Finance Officer will:

- Drive financial efficiencies, ensuring that ‘best value’ principles are applied consistently
- Work with the Chief Operations Officer to develop and implement the Trust’s procurement strategy, working in line with relevant requirements and policy
- Systematically review Trust-wide contracts and managed services to ensure these offer best value; make changes as deemed appropriate
- Work with the Chief Operations Officer and external parties (including contractors) to achieve the successful completion of capital works

### **Compliance**

The Chief Finance Officer will:

- Keep abreast of national and local policy drivers and changes to legislative, statutory and regulatory requirements; provide updates to stakeholders where appropriate
- Oversee financial compliance Trust-wide, having regard for all relevant legislative, statutory and regulatory requirements
- Achieve Trust-wide financial compliance through the delivery of a high-quality finance service

## ***‘Work together, learn together, succeed together’***

- Prepare and oversee monthly, quarterly and annual financial returns to the relevant public bodies e.g. Department for Education
- Ensure all financial returns, including the Annual Accounts and the Budget Forecast Return, are submitted to the relevant organisation in good time
- Ensure all finance-related policies comply with the relevant statutory and regulatory requirements; ensure these are approved by the Trust Board and published as required
- Ensure the Trust and its Academies comply with the Trust’s finance-related policies

### **Trust Development**

The Chief Finance Officer will:

- Identify key performance indicators related to the finance-related aspects of the Trust’s work and source evidence to demonstrate the Trust’s progress against these, addressing areas of underperformance
- Develop and share good practice across the Trust
- Source external advice and support where appropriate
- Take a lead role in developing Trust-wide systems and processes pertaining to core areas of the role
- Be responsible for the management of projects related to the role
- Seek funding from external sources and apply for grants on behalf of the Trust or its Academies, to aid Trust development
- Support schools to maximise income generation

### **Trust Growth**

The Chief Finance Officer will:

- Fully support the implementation of the Trust’s growth strategy
- Lead the financial due diligence, onboarding and ongoing financial support for new schools joining the Trust

## **Duties and Responsibilities – General:**

The Chief Finance Officer will:

- Uphold the ethos of the Trust
- Actively assist in achieving the Trust’s vision and aims
- Actively support the implementation of the Trust’s strategic plans
- Establish and maintain professional and effective working relationships
- Contribute positively to creating a productive and happy working environment
- Work effectively with colleagues as a member of the team, taking individual and collective responsibility for reinforcing and promoting a working environment free from discrimination, victimisation, harassment and bullying
- Participate as required in meetings and training with colleagues in respect of duties and responsibilities of the role
- Take responsibility for their own professional development and play a full and active part in the appraisal process
- Adhere to all Trust-wide policies and procedures, including those detailed in the Academy Trust Handbook and the Trust’s Scheme of Delegation
- Maintain confidentiality at all times in respect of Academy and Trust-related matters and prevent disclosure of confidential and sensitive information
- Undertake any other duties of a similar level and responsibility as required by the Chief Executive Officer

# Chief Finance Officer Person Specification

Chief Finance Officer			
Requirements of the Post	Essential	Preferred	Source
<b>Qualifications</b>			
Qualified to the DfE's required standard	•		Application
<b>Experience</b>			
<i>Experience of:</i>			
• Over five years' experience in a finance leadership role	•		Application
• Leading and managing finance at a strategic and operational level, across an organisation	•		Application, Interview
• Leading and managing essential change	•		Application, Interview, Presentation
• Budget management and forecasting, delivering management and financial accounts (gained in a 'hands on' role)	•		Application, Task
• Achieving financial compliance across an organisation	•		Application, Presentation
• Completing financial returns to external bodies	•		Application, Presentation
• Managing contracted services	•		Application, Interview
• Managing complex projects, from inception to completion	•		Application, Interview
• Managing computerised data systems (finance and payroll) and handling large amounts of complex finance data	•		Application, Task
• Leading successful teams	•		Application, Interview
• Working with a range of external professionals and organisations to achieve organisational aims	•		Application, Interview, Presentation
• Supporting the growth of an organisation		•	Application, Interview
<b>Knowledge and Skills</b>			
<i>Knowledge of:</i>			
• Finance-related documents that apply to multi-academy trusts		•	Interview, Presentation
• Public finances, procedures, practice and regulations (preferably Department for Education and sector requirements)	•		Interview, Presentation
• Compliance-related legislation relevant to the role	•		Interview, Presentation
• Finance, including budget setting, in an educational setting		•	Interview, Task
<i>Able to:</i>			
• Understand and appreciate working in a school context, including with regards to safeguarding and positive outcomes for pupils	•		Application, Interview, Presentation, Task
• Contribute to the strategic leadership of an organisation	•		Application, Interview, Presentation
• Play a lead role in a senior leadership team to achieve the vision and aims of an organisation	•		Application, Interview
• Drive change based on a sound strategic vision	•		Interview, Presentation
• Create and implement strategic plans	•		Interview
• Balance strategy with operations	•		Interview
• Lead and manage operational performance across an organisation	•		Application, Interview

## ***‘Work together, learn together, succeed together’***

• Achieve improvement in the operational aspects of an organisation	•		Interview, Presentation, Task
• Deliver a transparent, professional and financially efficient service which raises standards whilst providing value for money	•		Application, Interview
• Achieve greater financial efficiencies and achieve ‘best value for money’	•		Application, Interview, Task
• Review contracts and managed services to ensure these offer best value	•		Interview
• Measure the success of an organisation, including in relation to key performance indicators	•		Interview
• Monitor, evaluate and improve services across an organisation	•		Application, Interview
• Ensure the Trust complies with requirements from the Department for Education and those laid out in the Academies Trust Handbook	•		Interview, Presentation, Task
• Implement essential processes and procedures across an organisation and ensure these are consistently adhered to	•		Interview, Presentation
• Take full responsibility for the budgeting process for the Trust	•		Application, Task
• Ensure financial compliance across an organisation, through effective financial controls and well-managed systems	•		Application, Presentation
• Submit accurate financial returns in a timely fashion	•		Application, Presentation
• Effectively project manage	•		Application, Interview
• Actively support Trust growth	•		Interview
• Effectively lead and manage a team	•		Application, Interview
• Provide support, including training, to a range of stakeholders	•		Application, Interview
• Liaise effectively with external parties	•		Application, Interview
• Act as a professional and positive ambassador of the Trust	•		Interview, Presentation
• Create high-quality presentations and documents, including reports and policies, and present these to a range of stakeholders	•		Presentation, Task
• Prioritise workloads and to work to given deadlines	•		Interview, Task
• Work well under pressure and cope with the unexpected	•		Interview, Task
• Excellent literacy, numeracy and ICT skills	•		Application, Presentation, Task
Strong interpersonal skills and the ability to influence and build relationships at all levels whilst working across a range of sites	•		Interview
Commercially astute and have exceptional analytical and problem-solving skills with the ability to make decisions based on accurate and appropriate analysis	•		Task
Highly effective administrative and organisational skills	•		Application, Presentation, Task
<b>Personal Qualities and Attributes</b>			
Inspirational leader – leads with drive, commitment and enthusiasm	•		Application, Interview, Presentation
Leads by example	•		Interview, Presentation
Reliable, discreet, honest and trustworthy (able to maintain confidentiality)	•		Interview
Team player	•		Application, Interview
Effective communicator, verbally and in writing	•		Application, Interview, Presentation
Solution focussed	•		Interview
Committed to providing the best possible service to the staff and Trustees	•		Interview
Committed to safeguarding children and young people and promoting their welfare	•		Application, Interview
Committed to equal opportunities	•		Application, Interview
Committed to ongoing professional development opportunities	•		Application

# Employee Benefits

We recognise that successful people place value on a range of benefits associated with their careers including receiving professional recognition, commensurate financial reward, job satisfaction, opportunity to innovate and a balanced approach to work and personal time. As your future employer we place importance on these aspects too.

- Pay Range M7 point 58 -61 (£70,626 - £73,955) point
- Competitive pension scheme: Local Government Pension Scheme
- 28 days annual leave plus bank holidays, increasing to 31 days after five years’ service (continuous service is recognised)
- Flexible working arrangements
- Access to continuous professional development opportunities
- Supportive, friendly and professional working environment
- Strong partnerships and networks

A	...is for <i>acceptance</i>
L	...is for <i>liberty</i>
P	...is for <i>passion</i>

At the Agora Learning Partnership, we believe that collaboration is essential if we are to achieve our quest to improve the life chances of all the children in our care. We feel *passionately* that for collaboration to be successful, relationships must be both positive and respectful. Furthermore, all children and adults associated with our Trust must feel *accepted* and *liberated*; we firmly believe that everyone should be free to be who they want to be – they should be proud of their talents and interests and have their own thoughts, beliefs and ideas, which they can confidently promote and share. The Agora Learning Partnership is a place where discrimination is not tolerated; instead, we celebrate the diversity in people and value the positive impact all the children and adults in our Trust community have on our organisation.

We also recognise that we are responsible for ensuring that all children and adults within the Partnership can flourish and reach their full potential. To achieve this, we employ a range of strategies to help secure equity for all, where adaptations to the Trust offer are made in order to achieve this. Ultimately, this empowers people to feel fully included and able to play a positive role within the Partnership.

This aspect of the Partnership’s ethos and culture is imperative to its success and to the success of the staff and the children, during their time in the Trust and as they venture into the wider world. The children are developing the skills and the character they need to succeed in a wonderfully diverse world-wide community.

# The Recruitment Process

<b>Closing date:</b>	<b>11th February 2026, Midday</b>
<b>Shortlisting:</b>	<b>12<sup>th</sup> February 2026</b>
<b>Interviews:</b>	<b>24<sup>th</sup> February 2026 (All Day)</b>

The Agora Learning Partnership is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment. Successful appointments are subject to receiving satisfactory employment checks including references and a satisfactory Disclosure and Barring Service (DBS) Enhanced check. This post is exempt from the Rehabilitation of Offenders Act 1974.

# What we would like to know

Please read the job outline and person specification available at [MyNewTerm](#) then complete the online application form and supporting statement covering the questions below, by the closing date. More information about our Trust and schools can be found on the Agora Learning Partnership [website](#).

## **What skills, knowledge and experience do you have?**

Considering the job description and job specification for the post, how well do you match what we are looking for in terms of your skills, knowledge and experience?

There may be skills, knowledge and experience that you have which do not fit neatly into our job outline. Are there ways in which you think you can bring additional skills, contacts or knowledge that the Trust may find useful?

## **Are you the right person for our organisation and team?**

Please look at the list of personal attributes included in the person specification, which we think would be valuable for the post-holder. Tell us why you think you would be a good match for our organisation.

## **What is your evidence base and track record?**

What would you like to tell us that demonstrates the measurable impact of your work that you are most proud of?