



**MOSAIC**  
SCHOOLS LEARNING TRUST

## Chief Financial Officer Job Description

### Employment details

<b>Job title:</b>	Chief Financial Officer (CFO)
<b>Reports to (job title):</b>	Chief Executive Officer (Accounting Officer)
<b>Hours of work:</b>	36 hours per week, 52 weeks per year
<b>Starting Salary:</b>	£84,704 - £92,899 per annum depending on experience

### Main Duties and Responsibilities

Key Purposes
Ensure the financial sustainability of the multi-academy trust (MAT).
Support the Trust's strategic development and aims through effective financial planning and management.
Comply with all of the MAT's policies and procedures, working towards its core aims and ensuring confidentiality is maintained where appropriate, contributing to the ethos, development and success of the MAT.
Maintain a secure overview of the management of all financial issues within each of the MAT's academies and Central Trust, providing financial assistance to the Head Teachers of each academy, Central Team executives, the Chief Executive Officer (CEO) and Board of Trustees.
Keep the CEO and the Board up-to-date with the latest funding changes, company law and other statutory guidance, supporting the CEO in their role as Trust's Accounting Officer.
Always ensure the Trust acts in compliance with relevant legislation and adopts guidance where it is in our best interests.
To lead the promotion and delivery of good financial management so that public money is safeguarded at all times and used appropriately, economically, efficiently and effectively.
Establish and maintain a three-year rolling financial plan, to be updated annually.

Produce annually a consolidated budget plan for the consideration of, and approval by, Trustees.
Uphold good governance and ethical behaviour, including good accounting practices and internal control systems.
Ensure that the MAT's resources are managed efficiently, ethically and professionally.
Analyse and interpret financial reports, communicating findings in a simplified manner when necessary.
Cooperate with, initiate, and manage audit procedures.
Attend relevant committee meetings as required to maintain the presence of the finance function.
Implement appropriate safeguarding protocols and control measures.
Liaise with external regulators such as the Department for Education and Charity Commission.
Act as the leading point of reference for financial and commercial issues, advising on best practice on these matters both within and outside the sector.
Ensure implementation and efficient running of IT systems necessary for the smooth operation of finance and management functions.
Manage the central accounting role, ensuring that efficient income controls are in place and adhered to.
Develop close and effective working relationships with key partners and stakeholders.
<b>Operational and Strategic</b>
Analyse and interpret data in relation to the MAT; developing solutions and strategies over the medium and long term.
Review Trust policies, processes and procedures to ensure compliance with various regulations to include Company law, Charity law, Articles of Association, Funding Agreement, Academy Trust Handbook and HMRC.
Maintain effective systems of internal audit and control through implementation and monitoring
Develop and implement strategies for maximising the MAT's current finances e.g. through grant applications, income generation activities such as lettings
Prepare the MAT's annual financial forecasts
Attend relevant committee meetings e.g. Finance and Resources, Audit and Risk as well as full Board meetings
Work alongside the CEO and senior leadership teams in developing and maintaining a strategic financial plan, including a three-year budget plan.
Develop and maintain an in-house finance manual that sets out the MAT's operational procedures.

Lead financial and operational risk assessments and share with the CEO and trust board
Develop and implement financial policies and procedures across the MAT in order to streamline functions and ensure efficiency.
Manage all financial aspects of major capital projects.
Participate in the management of the MAT's major projects, as required by the CEO.
Work with the Chief Operating Officer (COO) and others to support the effective delivery of central services e.g. HR, Payroll, Estates management.
Participate in appraisal arrangements and undertake training and own CPD. Provide training support and guidance to the Trust's finance managers/finance officers and ensure financial management systems are standardised and of the same quality across the Trust.
Oversee the operation of the Trust's Scheme of Delegated Authority (SoDA) with respect to financial matters – See Section 5 of the SoDA.
<b>Budgetary control</b>
Oversee the preparations of an annual budget plan for each academy within the MAT and central services function before the start of each financial year. Liaising with the CEO, central staff and headteachers of each academy.
Monitor expenditure and report to the CEO regarding income and cash flow against the approved budget.
Manage the Trust's balance sheet to include fixed asset accounting and control account reconciliations.
Submit reports on each academy and central business services financial position to each meeting of the Finance and Resources Committee, including appropriate financial efficiency metrics.
Assist each academy's headteacher and central executives in setting and managing their budgets.
Approve monetary transactions within the delegated financial limits for the MAT's core operations and report such approvals to the Finance, Audit and Risk Committee.
Review any monetary transactions required for an academy's budget and recommend these to the CEO and Board of Trustees for approval if appropriate.
In liaison with finance staff prepare monthly consolidated management accounts to include variance analysis, balance sheet, key financial performance indicators and cash flow projections. Management accounts must be shared with the chair of trustees and chair of the Finance and Resources, Audit and Risk Committee every month.
Advise the CEO and the Board if fraudulent activities are suspected or uncovered.
<b>Procurement and purchasing</b>
Maintain an overview of all the academies within the MAT and central services, providing best value options for key purchases.

Oversee tenders for service contracts, evaluating cost effectiveness and value for money.
Provide advice to the Trust's staff and the CEO over evaluation of quotes obtained for goods and services.
Prepare financial appraisals of new projects.
Ensure that an ethical purchasing system is in place to guarantee value for money is obtained and best use made of resources.
<b>Organisational</b>
Ensure that academy-based administrative staff receive timely, succinct and clear guidance to ensure that they are effective and efficient in the discharge of their duties.
Ensure all forms and returns required by the DfE are prepared and submitted in the specified format and filed before the deadline.
Co-ordinate internal and external audit processes and liaise with external regulators as required.
Write the annual report and prepare the consolidated financial statements in the specified format for auditing by external auditors.
Liaise with the Finance Committee, accountants and auditors where appropriate.
Prepare appropriate bids or tender documents to acquire identified additional funds or grants.
Ensure the monthly payroll is checked and certified.
Report to the DfE and other relevant bodies in line with their specific requirements.
Maintain records to an appropriate standard in order to meet legal and tax requirements.
Ensure appropriate insurance cover is in place and arrangements are regularly reviewed and monitored.
Promote financial awareness throughout the Trust.
Identify and implement opportunities for collaborative working across the whole financial function of the MAT.

## Person specification

	Essential	Desirable
Qualifications and training	<p>The successful candidate will:</p> <ul style="list-style-type: none"> <li>Be a qualified accountant or be training to become one e.g. ICAEW, ACCA, CIMA or CIPFA (including CIPFA qualifications developed in partnership with ISBL)</li> </ul>	<ul style="list-style-type: none"> <li>Will have a good knowledge of school and/or MAT financial procedures.</li> </ul>
Experience	<p>The successful candidate will have experience of:</p> <ul style="list-style-type: none"> <li>Working with financial management systems.</li> <li>Leading and managing budgets.</li> <li>Designing and implementing financial management processes and controls.</li> <li>Managing procurement and contracts.</li> <li>Generating income and preparing bids.</li> </ul>	<ul style="list-style-type: none"> <li>Experience of working in an educational setting.</li> <li>Experience of obtaining additional funding.</li> <li>Experience of working with external auditors and agencies.</li> <li>Managing and working in a large organisation which operates across multiple sites.</li> </ul>

<b>Knowledge and skills</b>	<p>The successful candidate will have:</p> <ul style="list-style-type: none"> <li>• Up-to-date knowledge of accountancy and professional codes of practice.</li> <li>• A good working knowledge of The Academy Trust Handbook 2025.</li> <li>• Experience of reviewing internal controls systems and making recommendations for improvement</li> <li>• Knowledge of statutory requirements and funding strategies regarding the education sector.</li> <li>• Proven awareness and respect for the highly sensitive status of information and its confidentiality.</li> <li>• The confidence to challenge opposing views by presenting robust arguments and reasons for the contrary view.</li> <li>• Excellent written and verbal communication skills.</li> <li>• Well developed ICT skills</li> </ul> <p>The successful candidate will be able to:</p> <ul style="list-style-type: none"> <li>• Interpret complex financial information and statute, and devise policies and procedures in light of these.</li> <li>• Work as part of a team as well as work independently.</li> <li>• Work effectively with colleagues and trustees.</li> <li>• Manage projects and lead a group.</li> <li>• Efficiently collate and analyse data.</li> </ul>	<ul style="list-style-type: none"> <li>• An ability to motivate colleagues.</li> <li>• An ability to identify commercial opportunities to maximise income.</li> </ul>
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<b>Personal qualities</b>	<p>The successful candidate will have:</p> <ul style="list-style-type: none"><li>• Excellent analytical and problem-solving skills.</li><li>• Excellent time management and organisational skills.</li><li>• High expectations of self and professional standards.</li><li>• The ability to maintain successful working relationships with other colleagues.</li><li>• A willingness to work outside of the timetabled day, where necessary.</li><li>• High levels of drive, energy and integrity.</li></ul> <p>The successful candidate will be:</p> <ul style="list-style-type: none"><li>• Able to promote and build professional behaviours consistently.</li><li>• Able to plan and take control of situations.</li><li>• Able to work flexibly, attending and contributing towards meetings and training outside of their specified work hours.</li><li>• Committed to contributing to the wider trust and its community.</li><li>• Capable of handling a demanding workload and be able to successfully prioritise work.</li></ul>	
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