Chief Financial Officer

Context

Lord Williams's School is a thriving and popular comprehensive school. The annual delegated budget is in excess of £15m and there is an additional £0.5m turnover from lettings income, sales and fundraising.

The prime responsibility of the Chief Financial Officer (CFO) is to provide strategic management and leadership of the financial and commercial operations and performance of the Trust and to undertake the role of CFO as outlined in the Academies Trust Handbook and other documents from the DfE.

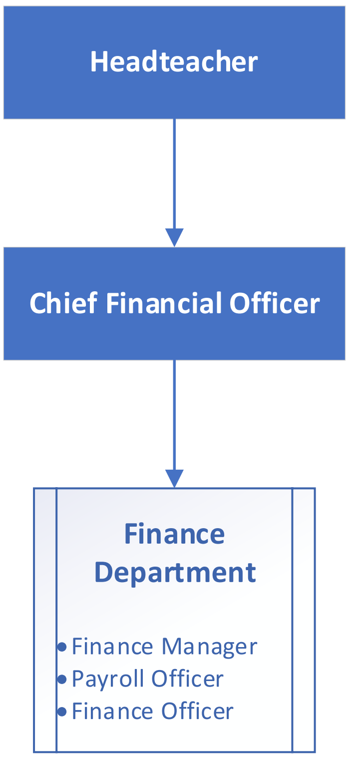
The CFO leads, operates, maintains and develops the financial procedures and systems within the Trust in consultation with the Senior Leadership Team (SLT) and Trustees, ensuring that legal requirements are met.

The school is split site, some two miles apart and converted to Academy status on 1st September 2012. It is a single school within a multi-academy Trust. There are 2,200 students on roll.

The post supports the delivery of the highest quality teaching and learning and the fulfilment of the school's aims and objectives. Teamwork is a key feature of our work.

The CFO is line managed by the Headteacher and has a key role in briefing and advising the SLT and Trustees. The CFO is accountable to the Headteacher.

The staffing structure is given below:



Job Description

Job Purpose

The role of Chief Financial Officer is an exciting opportunity for an experienced professional to join our team and be responsible for strategic management and leadership of the financial and commercial operations and performance of the Trust.

You will work closely with the Headteacher and Trustees, ensuring the school's excellent financial position is maintained and enhanced

This is an excellent opportunity to join one of Oxfordshire's largest and most successful schools. Effective administrative systems support the two sites. Students are well-behaved and motivated, and there is a strong sense of community in Thame, with a committed parent and carer support base.

Key Responsibilities

Leadership

- Contribute to the ethos, development and success of the Trust
- Manage resources to ensure the best outcomes
- Actively support the work and ethos of the Trust
- Manage and develop team members
- Identify opportunities to improve value for money
- Comply with and support all policies and procedures related to safeguarding children, equal opportunities and the promotion of Fundamental British Values
- Participate in arrangements for appraisal and the identification of areas in which would benefit from training and undergo such training
- Proactively keep abreast of developments in relation to the post, and whenever possible and appropriate, attend professional development opportunities
- Show fidelity to the commitment and ethos of the Trust and to the implementation of agreed policies and procedures
- Ensure that Trust resources are managed efficiently, ethically, professionally, with integrity and conforming to all internal and external regulatory requirements and in a sustainably sound manner
- Undertake such additional duties as may reasonably be requested by the Headteacher or his representative.

Finance

- Act as the leader for all finance related work; this includes leading staff within the Trust employed with a finance function
- Undertake the role of CFO as outlined in the Academies Trust Handbook and any other relevant documents from the DfE
- Act as the leading point of reference for financial and commercial issues
- Provide strategic management and leadership of the financial and commercial operations and performance of the Trust
- Lead the annual budget and three-year planning cycle aligned to organisational strategy.
- Monitor income and expenditure against budget
- Oversee production of the year-end accounts
- Provide visible leadership on all financial issues

- Represent the Trust at external meetings and events
- Ensure that monthly management accounts and other ad hoc reports as required are prepared on a timely basis along with appropriate management commentary comparing performance against budget and analysing variances
- Work with the Headteacher to develop and deliver the 3-year financial plan taking account of DfE guidelines/funding, identifying additional sources of external revenue and funding
- Prepare the annual budget in accordance with the requirements of the Trust and DfE
- Implement and operate rigorous and robust audits and controls
- Make appropriate arrangements for the external audit of accounts and liaison with auditors during their audit work
- Provide sound financial advice to Directors, Trustees and SLT colleagues
- Ensure the appropriateness of the key assumptions included in the medium- and long-term financial plans and annual budget proposals
- Maintain the Trust's financial and accounting systems and ensure the provision of financial information to the to the Headteacher, SLT, Directors, Trustees, the Finance, Facilities, Audit and Risk Committee and external bodies as required
- Maintain a Risk Register for the Trust to record risks and controls as they arise and ensure the Risk Register is monitored and updated on a regular basis and reported to the Finance, Facilities, Audit and Risk Committee
- Prepare financial appraisals for new projects
- Report on a timely basis to the DfE and other relevant bodies in line with their specific requirements. Assist with the School Census and Workforce Census returns
- Ensure that financial management within the Trust complies with the requirements of the Academies Trust Handbook and Academies Accounts Direction issued annually by the DfE which sets out the requirements for the preparation and audit of the annual report and financial statements of the Trust
- Produce monthly and annual accounts in accordance with the Companies Act 2006, UK accounting standards and DfE requirements, together with a detailed commentary on the result and on all significant variances from budget
- Plan and manage the Trust's tax affairs under existing and new legislation
- Manage tax and VAT liabilities
- Ensure that appropriate internal control processes are in place, in accordance with DfE Funding Agreement to minimise the risk of financial losses and to maximise economy and efficiency in the use of resources, enable accountability at appropriate levels
- Ensure the integrity of accounting for payroll and pensions transactions and ensure that payroll reconciliations are properly performed
- Liaise with appropriate bodies in such areas as: legal, regulatory, approvals and accreditations
- Manage cash balances and cash flow
- Ensure an effective purchasing system is in place to ensure value for money is obtained and to make best use of resources
- Ensure Gift Aid is claimed where applicable
- Manage internal audit process
- Manage investment of school reserves

Knowledge

- Keep abreast of financial developments across academies, including direction from the DfE and charity sector
- Understand the principles and practice of risk management

Procurement

- Be a catalyst for driving financial efficiency across the Trust
- Manage and oversee the Trust's assets ensuring that the full inventory of assets is recorded in an asset register and that accounting for fixed assets is in accordance with Companies Act and appropriate accounting standards.
- Manage/support tender processes as required

Other Duties

Undertake any other reasonable tasks within the scope of this job description.

Reporting lines

The Chief Financial Officer reports to the Headteacher.

General Responsibilities

All staff employed by Lord Williams's School are expected to work within the following policies and procedures:

Safeguarding

Ensure that all school safeguarding and child protection policies are adhered to and concerns are raised in accordance with these policies.

Health and Safety

- Take reasonable care of their own Health, Safety and Welfare and that of others who may be affected by what they do or do not do.
- Be familiar with emergency and First Aid procedures.
- Co-operate with all issues involving Health, Safety and Welfare.
- Use work items provided correctly and in accordance with training and instructions.
- Not interfere with or misuse anything provided for protection of Health, Safety or Welfare.
- Report any Health, Safety or Welfare concerns to their line managers as soon as is practicable.
- Ensure tasks are completed in a safe manner.

Security and Data Protection

Work within the confines of the UK General Data Protection Regulation (UK GDPR), the Data Protection Act 2018 and the Data (Use and Access) Act 2025 to ensure the security and confidentiality of data.

Equal Opportunities Statement

The school's policy is to employ the best personnel and to provide equal opportunity for the advancement of employees including promotion and training and not to discriminate against any person because of their race, colour, national or ethnic origin, sex, sexual orientation, marital status, religion or religious belief, disability or age.

Person Specification

Qualifications

Essential:

- Level 2 qualification (GCSE or equivalent) in English (A, S)
- Level 3 qualification (A Level or equivalent) in Mathematics or similar (A, S)
- Level 6 (Degree or equivalent) in Accountancy or similar (A, S)

Desirable:

- Relevant professional financial qualification (ACA, ACCA, CIMA or CIPFA) (A, S)
- Other related professional qualification e.g. Fellow of NASBM, DSBM or CSBM (A, S))

Experience and Knowledge

Essential:

- Significant experience in leading an effective finance function (A, I, S)
- Proven experience of designing and implementing financial management processes and controls (A, I, S)
- Managing change (A, I, S)

Desirable:

- Previous experience in a public sector environment (A, S)
- Experience of working in an academy trust (A, I, S)
- Payroll and pensions regulations (A, I, S)
- Pay and conditions in the education sector (A, I, S)

Skills and Abilities

Essential:

- Analytical and problem-solving skills (T)
- Numeracy and the ability to interpret data accurately (T)
- High level ICT skills (A,T)
- Strong commercial awareness (I)
- An understanding of the principles and practice of risk management (A, I, S)
- Able to identify with and actively promote the goals and commitment of the Trust (I)
- Ability to manage and develop team members (I)
- Excellent communication and presentation skills including the ability to impart complex financial information to non-financial stakeholders (A, I, T, S)
- Proactive, innovative approach and constantly looking for improvement (I)
- Ability to relate well to colleagues and students (I)
- Calm under pressure and able to reconcile conflicting priorities (I, T)
- Energy and resilience (I)

- Budget setting (A, I)
- Financial modelling (A, I)

Personal Qualities

- Commitment to education and the development of young people (A, I, S)

Safeguarding

- Motivation to work with children and young people in an educational setting (A, I, S)
- Ability to maintain personal boundaries with children and young people (I)
- Commitment to implement the school's Positive Behaviour Management Policy or to refer to teaching colleagues as appropriate (I)

Other

- Flexibility in terms of hours and location with the ability to attend evening meetings and to occasionally work weekends as required (A, I, S)
- Driving licence and use of own car (A)

S = Used for shortlisting

A = Assessed using application form

I = Assessed at interview

T = Assessed using testing

Terms and Conditions

Salary

The salary for this post is Grade 16. The full-time salary is £63,576 to £65,857 per annum (pay award pending). Progression is by annual increment. Starting salary will be dependent upon qualifications and previous, directly comparable experience.

Hours

The hours are 30-37 per week, either full time throughout the year or term time plus 4 weeks working during the school holidays/INSET days. The post-holder will need to have a degree of flexibility required in the hours worked to meet operational demands during peak times.

Annual Leave entitlement starting at 30 days per year plus bank holidays.

Terms and Conditions

Thame Partnership Academy Trust employs support staff working at Lord Williams's School on the conditions of service contained in the National Joint Council for Local Government Services National Agreement on Pay and Conditions of Service (Green Book), the provisions of which allow for a 26-week probationary period for new employees. On completion of a satisfactory probationary period, the post will be confirmed as permanent.

Pension arrangements

The postholder will be entitled to join the Local Government Pension Scheme (LGPS). The LGPS is a valuable part of the pay and reward package for employees. The key features of the scheme can be found here: https://www.lgpsmember.org/toj/thinking-joining-key.php

Location

The successful applicant will be an employee of Thame Partnership Academy Trust and may be required to work on any of its sites.

Safeguarding

Lord Williams's School is committed to safeguarding and promoting the welfare of children and vulnerable adults and expects all staff and volunteers to share this commitment.

All successful candidates will be subject to enhanced Disclosure and Barring Service checks along with other relevant employment checks.

Any offer of employment is subject to satisfactory medical, reference and DBS clearance and also to The Asylum and Immigration Act ID checks.

This post is exempt from the Rehabilitation of Offenders Act 1974 (Exceptions) Order 1975 (2013, 2020 and 2023). This means that certain convictions and cautions are considered 'protected' and do not need to be disclosed to employers, and if they are disclosed, employers cannot take them into account. Guidance about whether a conviction or caution should be disclosed can be found on the Ministry of Justice website:

https://www.gov.uk/government/publications/new-guidance-on-the-rehabilitation-of-offenders-act-1974