



Heritage MAT  
*Excellence through collaboration*

# CANDIDATE INFORMATION PACK

Chief Finance  
Officer



## Chief Financial Officer (CFO) Job Description

**Due to the retirement of our existing CFO, we are seeking to appoint an experienced leader in school business and finance.**

**Start Date:** 1<sup>st</sup> June 2026 (Some flexibility depending on availability of the candidate).

**Salary:** L19 – L24 (School Leadership Group Pay Scales).

**Hours:** Part time at either 0.6 or 0.8 (three or four days per week) depending upon experience of the candidate. 52 weeks per year with 33.5 days holiday (pro rata).

**Contract:** Permanent

### 1. Role Purpose:

The CFO is a high-level technical and leadership role, responsible for the strategic oversight of Heritage MAT's financial planning, budgets and statutory compliance. Reporting directly to the CEO, the CFO acts as the principle financial adviser to the Board of Trustees and the Finance, Audit and Risk Committee (FA & RC), ensuring that public funds are used effectively to achieve the best outcomes for pupils.

### 2. Key Responsibilities:

#### Strategic Financial Leadership:

- Take responsibility for the Trust's financial management systems, including managing user access, providing training, considering future system developments and generating reports.
- Advise the CEO and Trust Board on financial strategy, including the development of a three-year plan aligned with the Trust's strategic priorities.
- Conduct financial due diligence on schools proposing to join the Trust and support the Trust's growth strategy.
- Lead the promotion of sound financial management at each school, ensuring the Trust operates as a going concern.
- Support other members of the Trust Central Team in the development of functional strategies and plans.
- Work with the CEO and Central Team to effectively manage change within the MAT.
- Understand the effects and implications of government policies, legislation and directives and develop effective strategies for current initiatives and long-term educational trends and developments.

#### Financial Management and Control:

- Direct the annual budget process for both revenue and capital expenditure, ensuring all individual academy budgets are aligned with school improvement plans.
- Maintain the Trust's fixed asset register and oversee capital projects.
- Manage the Trust's cash position and treasury management robustly, to avoid overdrafts.
- Ensure that all necessary monitoring and evaluation of finance and performance is undertaken across the MAT and reported to the Local Governing Bodies (LGB) and the Board of Trustees.

- Direct the production of the annual report and accounts, including the statement of financial activities, balance sheet and associated notes to the accounts.
- Ensure all procurement procedures achieve value for money and comply with the Public Contracts Regulations.
- Act as Company Secretary for the MAT ensuring deadlines are met for all returns and publications

#### Reporting and Compliance:

- Prepare and share monthly management accounts (including income and expenditure, balance sheet, and 12-month rolling cash flow forecasts) with the Chair of Trustees.
- Complete and submit all required financial returns to the DfE and Companies House.
- Ensure the Trust adheres to the Academy Trust Handbook, its Funding Agreement, and the Charity Commission's Statement of Recommended Practice (SORP).
- Comply with policies and procedures relating to child protection; health and safety; confidentiality; and data protection and report all concerns to an appropriate person.

#### Audit, Risk, and Scrutiny:

- Oversee the internal scrutiny programme, reporting to the FA & RC on the adequacy of the Trust's internal control framework.
- Manage the external audit process, ensuring timely response to findings and implementation of recommendations.
- Maintain and frequently review the Trust Risk Register, including contingency and business continuity planning.
- Ensure appropriate levels of insurances are in place to fully capture the needs of all the establishments within the MAT.

#### Leadership and Management:

- Lead and manage the Trust Finance Team, taking responsibility for their professional development and performance.
- Oversee the effective delivery of payroll and pension services (TPS and LGPS) across the Trust.
- Ensure the Trust is GDPR compliant and maintains adequate insurance or RPA cover.

#### Governance

- Prepare for, attend, participate and present in Trust Board meetings.
- Liaise regularly with the Board of Trustees, attending meetings of the Board and sub groups as required and ensuring prompt and effective responses to issues emerging from meetings.
- Lead governance and Trust Board reporting process and deliver its outputs efficiently and to time.

#### Other Duties

- Any other reasonable tasks commensurate with the role to include before, during and after school duties as member of the Central Team to ensure the smooth running of the MAT.
- Individuals have a responsibility for promoting and safeguarding the welfare of children and young people they are responsible for or come into contact with.
- Ensure all tasks are carried out with due regard to Health and Safety.
- Undertake appropriate professional development including adhering to the principle of performance management.

- Adhere to the ethos of the MAT, promote the agreed vision and aims of the MAT and set an example of personal integrity and professionalism.

Line Manager:

- The CEO will oversee the work of the CFO and check that his work is within established guidelines. The CFO is expected to manage their own schedule of work so that all internal and external deadlines are met.

Line management responsibilities:

- The CFO currently line manages the Financial Accounts Manager who works across four of the partner schools. The CFO also supports the Business Managers in two of the partner schools.

Commitment to core vision and values:

- The CFO is expected to share our commitment to our core vision and values:

Our Mission

- Through collaborative approaches and strong leadership systems, the Trust will provide an aspirational and exceptional all-through education for all pupils, staff and community members of our Trust.

Our Vision

- We aspire to build a thriving, collaborative community of schools where every child receives an exceptional education, regardless of background or starting point. Our vision is to nurture environments where learners are inspired, supported and challenged to achieve academic excellence, develop strong character and grow into confident, capable individuals. Through a shared commitment to high standards, innovation, and inclusive practice, we aim to transform lives and help shape a better future for all our pupils and the communities we serve.

○ Our Values

- **Inclusivity:** All pupils will be supported and challenged in a caring environment in order to excel and achieve to the best of their potential.
- **Collaboration:** Through collaboration in teaching and learning and analysis of key performance indicators, we will drive school improvement for the benefit of all pupils and stakeholders.
- **Excellence:** Our staff, pupils and stakeholders will strive for exceptional outcomes, with value added through working together.

## Person Specification

<b>Criteria</b>	<b>Essential</b>	<b>Desirable</b>
<b>Qualifications</b>	Accountancy qualification (e.g., ICAEW, ACCA, CIMA, or CIPFA) and membership of a relevant professional body.	Degree-level education or equivalent.
<b>Experience</b>	Significant senior-level financial leadership experience in a complex organisation, involving budget consolidation across multiple operations.	Experience working within the academy or education sector.
	Proven track record of strategic budget management and long-term financial planning.	Experience in managing multi-site teams and change management.
	Experience of presenting financial strategies to a Board of Trustees or similar governing body.	Experience with bid writing for capital grants.
<b>Knowledge</b>	In-depth knowledge of accounting standards, Charity SORP, and the legal framework for MATs.	Understanding of school funding streams and DfE reporting requirements; a strong working knowledge of the Academies Handbook.
	Expert knowledge of internal control systems, audit, and risk management.	Detailed knowledge of Data Protection / GDPR.
	Experience of managing payroll and HR within a similar role.	
	High level of IT competence, literacy and numeracy skills.	
	Experience of using and supporting others in the use of financial software packages.	Working knowledge of Access Finance & Budgeting software.
<b>Skills</b>	Strong analytical skills with the ability to interpret complex financial data for non-specialists. An eye for detail and meticulous approach to the role.	
	Excellent organisational, interpersonal and influencing skills to manage/communicate with diverse stakeholders at all levels.	A good sense of humour and emotional intelligence. Polite and outward facing.
	Excellent skills in strategic planning, change management and strategic management of financial resources.	Progressive and forward-thinking approach.
<b>Criteria</b>	<b>Essential</b>	<b>Desirable</b>
	Strong evidence informed decision-making skills with the ability to make decisions and recommendations based on the analysis of options.	Evidence of risk analysis skills.
	Capacity to work under pressure to meet deadlines and organisational priorities.	

	Flexible in terms of working patterns and evolution of the role.	
<b>Attributes</b>	Unwavering commitment to the 7 Principles of Public Life (Selflessness, Integrity, Objectivity, Accountability, Openness, Honesty, and Leadership).	
	Resilience in the face of challenge and the ability to work under pressure to meet statutory deadlines.	
<b>Other</b>	Commitment to safeguarding and promoting the welfare of children.	
	Driving license and own transport.	