

CHIEF FINANCIAL AND OPERATIONS OFFICER



**MOWBRAY
EDUCATION TRUST**

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Children First



Section 1: About Mowbray Education Trust

Mowbray Education Trust is a Multi-Academy Trust (MAT) serving the interests of over 3,000 young people, with a dedicated team of over 500 staff members. We believe that education should not only be accessible but also relatable, and that is why we are so proud to be an integral part of our local communities.

Our cluster model comprises of feeder primary schools working with their local secondary. This enables us to make sense of curriculum, transition arrangements and to build meaningful and effective relationships with families over time while educating, inspiring, and nurturing the talent of children throughout their time with us.

Our original cluster is in the Melton Mowbray area and consists of six primary schools and John Ferneley College. Our second and newest cluster is being established in the Shepshed and Loughborough area, and currently consists of our second secondary school, Iveshead, which also brings post 16 education to our Trust. The recent growth at secondary has allowed us to explore the benefits of collaboration and has enabled talented staff to be retained in the Trust through secondments and fresh opportunities. This has allowed us to take a step closer to our vision of one team delivering across all settings.

For further information about our individual schools, please follow this link: <https://www.mowbrayeducation.org>.

Our Executive Team

The Executive Team works openly and transparently with a shared oversight, responsibility, and accountability of the Trust in its entirety. By understanding the workload, pressures and demands in each area individually, we work to support one another and share information and inspiration to drive improvement across the whole Trust.

"I joined the Trust as CEO at the end of April 2025 and have been consistently impressed by the strong professional relationships between our Executive Team, Headteachers, and schools. As Accounting Officer, I recognise this role as a key appointment for the Trust, and we are seeking an experienced colleague who can ensure continued financial compliance and high standards of stewardship."

This is an exciting opportunity to contribute to the strategic direction of an ambitious, high-performing Trust. We are in a strong financial position, and in July 2025, we were formally confirmed as no longer being under a Financial Notice to Improve. Our growth plans are underpinned by ethical values, and we are proud to be working in partnership with Leicestershire Local Authority to promote an inclusive and collaborative agenda across the Trust.

The Chief Financial and Operations Officer will play a pivotal role in strengthening our financial strategy and oversight, helping to secure the best outcomes for our schools. At the core of our work is our commitment to putting 'Children First', inspiring continuous improvement and delivering the highest quality education across our academies.

I welcome informal discussions about the role and look forward to receiving your application."

Louise Lee, Chief Executive Officer



Our Location

Melton Mowbray and Shepshed are both thriving market towns surrounded by beautiful villages in the Leicestershire countryside. They are centrally located and exceptionally well connected. Both are easily accessible, just half an hour away from the cities of Nottingham and Leicester, with Loughborough and Derby also within a commutable distance. The Borough of Melton is famous for being the 'rural capital of food', with employers such as Samworth Brothers and Mars, and many annual popular events including the National Pie Awards and regular food markets. As a rapidly expanding town, Melton is seeing an increasing population from the current 52,000 with 17% of the population being under 16.

Shepshed is situated in the Borough of Charnwood, with quick access to open countryside, including areas of park land as well as convenient access to the M1 motorway. As a small town, Shepshed has good amenities, some of which (such as the swimming pool) are centred on the Iveshead campus and will soon see significant investment made into its infrastructure. Shepshed has a current population of approximately 15,000 but like Melton is growing as new houses are built.



Trust Employee Benefits

- High quality continuous professional development
- Career progression opportunities within the Trust
- Occupational sick pay, maternity and paternity pay
- Access to the generous Local Government Pension Scheme
- Cycle to Work Scheme
- Free Eye Care Scheme
- Employee Assistance Programme
- Accessible central services including HR, Finance and IT



In addition, our head office at Pera Business Park also provides access to:

- On-site parking
- Complimentary gym use
- On-site cafe



Section 2: Role Overview and Job Description

Job Description

Responsible to: Chief Executive Officer

Responsible for: Line Management of Finance and Estates Teams

Place of work: Central Office (Pera Business Park, Melton Mowbray) with frequent travel to schools. Working from home is possible in agreement with the CEO and in line with the Flexible Working Policy.

Salary: LCC Grade 17 / Points 51-53 (or equivalent), FTE £82,179 - £89,487 (Subject to Review)

Hours: Full-time, 37 hours per week (Permanent)

Job Purpose

To lead the Multi Academy Trust's (MAT) day-to-day operations, improve operating procedures to enhance efficiency and implement agreed strategies, working with the Board of Trustees and the Chief Executive Officer (CEO). To ensure that the establishments within the MAT, including schools and our mainstream nursery, all adhere to their required deadlines for submission of returns and publication of statutory information.

The CFOO will provide strategic financial leadership and management, ensuring the financial sustainability and probity of the trust and its academies. The successful candidate will be instrumental in shaping and delivering a forward-looking operational and financial strategy that supports organisational transformation, drives performance improvement, and secures long-term resilience in a demanding funding landscape. The postholder will be responsible for the overall financial health of the organisation including financial planning, budgeting, reporting and adherence to the Academies Trust Handbook, ensuring all academies and stakeholders adhere to the clear principles outlined within the handbook. The CFOO also plays a key role in supporting the CEO and the Board in achieving the trust's strategic goals.

Financial Management and Compliance

- Provide strategic oversight and guidance to the Mowbray Educational Finance Team. Oversee the day-to-day financial and operational management of the MAT, including budgeting, monitoring and risk management, ensuring all establishments within the MAT are strategically planning and delivering.
- Ensure that all financial regulations (specifically SORP), schemes of delegation and financial procedures are fully adhered to, reviewed and updated as required by the Department of Education, Charity Commission, HMRC and other regulators.
- Lead on the preparation of budgets and monitoring in line with the Funding Agreements established between the MAT and schools and nursery within the MAT.
- Ensure the availability of timely financial information to the Board of Directors, CEO and MET and support the finance team in the interpretation and reporting of financial information.
- Lead the due diligence process for any future opportunities in terms of growth and expansion of the MAT.
- Manage and oversee the coordination of the internal and external audits and preparation of the statutory accounts for each establishment within the MAT, and the preparation of the consolidated accounts for presentation to the Board of Trustees.
- Implement appropriate audit and control measures and maintain relationships with auditors and bankers.



- Line manage the MAT Finance team to ensure efficient procedures are being followed in terms of MAT accounts and associated reports.

Strategy and Change Management

(including the line management of Estates)

- Work collaboratively with the CEO and the Mowbray Executive Leadership Team.
- Work alongside the CEO to implement the 3-year academy strategy business plans, including setting and managing budgets, targets and outputs and reviewing progress against these.
- Support other members of the Executive Team in the development of functional strategies and plans.
- Work with the CEO and MET to effectively manage change within the MAT.
- Work with the CEO, and other colleagues with relevant responsibilities, on the strategies for premises improvements and health and safety across the whole MAT.
- Line manage facility management across the MAT, by working with the Trust Estates Manager, CEO and leaders in schools and college.
- Support the Estates Manager with MAT-wide bid writing to secure external capital funding for building works as necessary.
- Support with facilitating the design of new initiatives with the MET and implementation across the MAT.
- Provide strategic leadership to shape and implement a high-impact transformation agenda, improving operational and financial performance across the Trust while building capacity and culture for sustainable growth.

Business Management

- Lead on aspects of effective risk management across the MAT, with oversight of financial and Estates Management Risk.
- Lead as the primary point of contact for finance, VAT and risk to ensure MAT-wide administration is efficient and effective.
- Develop relationships with suppliers and lead on supplier cost effectiveness projects.
- Lead the drive for efficiency throughout 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.
- Negotiate, manage and monitor contracts, tenders and agreements ensuring 'best value' at all times.
- Ensure appropriate levels of insurances are in place to fully capture the needs of all the establishments within the MAT.

Aspects of Human Resource (HR)

- Work with the CEO, Director of People and Executive Team to strategically plan the HR resource requirements (costs) for each establishment. Prepare salary forecasts to demonstrate affordability and sustainability of staffing structures required.
- Support the implementation of other HR processes as necessary e.g. payroll.



Governance

- Liaise regularly with the Board of Trustees, attending meetings of the Board and committees as required and ensuring prompt and effective responses to issues emerging from meetings.
- Lead governance and Trust Board financial reporting processes and deliver its outputs efficiently and to time.
- Work alongside the MET to ensure that appropriate agendas are circulated and documents uploaded, so that meetings can be effective.

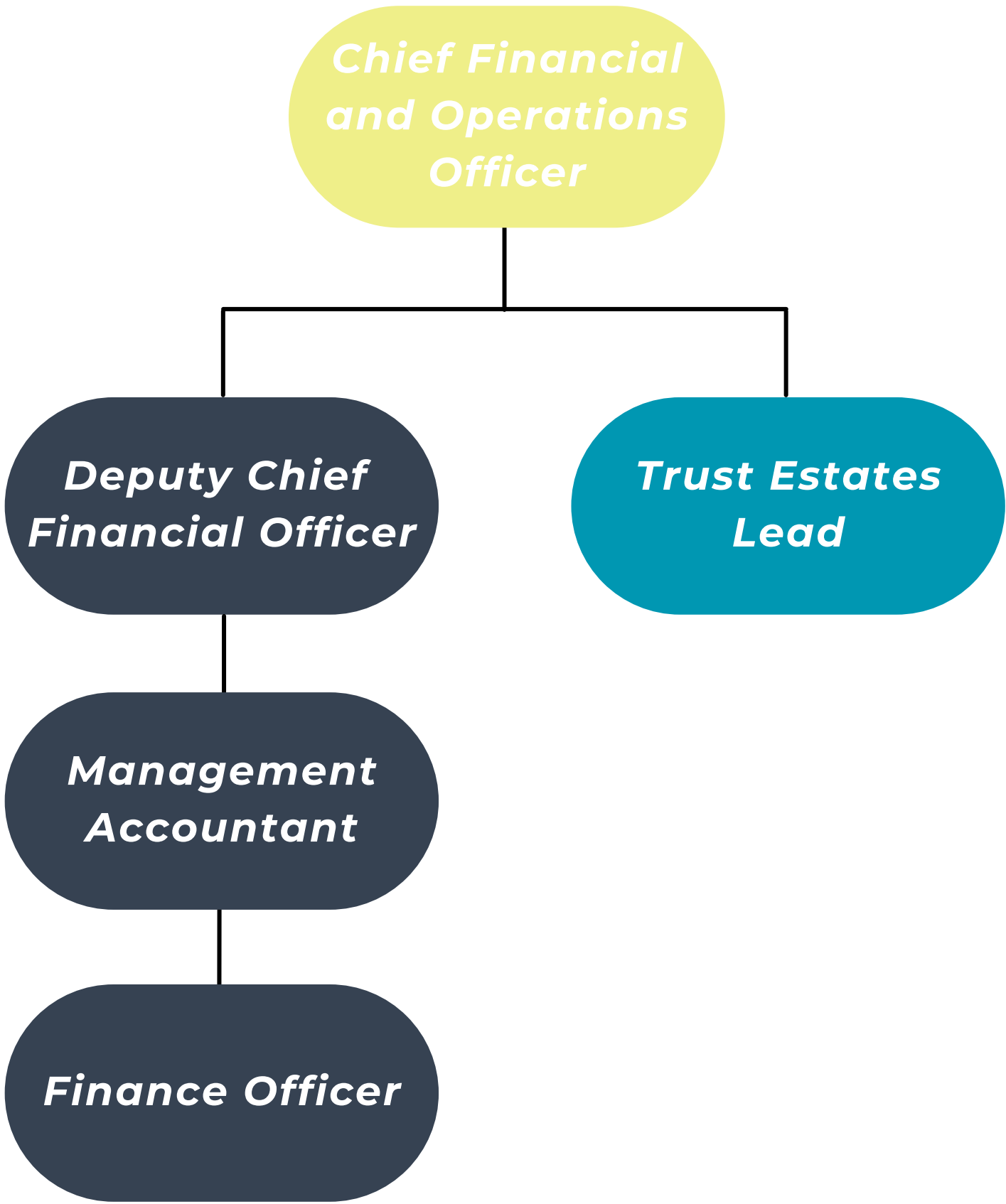
Marketing

- Support the promotion of the MAT to different audiences and raise the profile within the local community.

Other Duties

- Any other reasonable tasks commensurate with the role as a member of MET to ensure the smooth running of the MAT.
- Individuals have a responsibility for promoting and safeguarding the welfare of the 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, ‘Children First’, and to promote the agreed vision and aims of the MAT and set an example of personal integrity and professionalism.

Line Management Structure



Section 3: Person Specification

Source Key: A = Application Form, I = Interview, R = Reference, C = Certification

Qualifications	Essential	Desirable	Identification Method
Professional finance or finance related qualification at graduate level (i.e. ACA, ACCA, CIMA, CIPFA, MAAT or equivalent).	X		A/C
Evidence of updating skills and knowledge, including training in the area of school/trust/charity finance.	X		A/C
Experience			
Experience managing significant financial resources with a good appreciation of relevant regulatory frameworks.	X		A/I
Familiarity of financial processes and procedures.	X		A/I
Experience of effectively managing a team.	X		A/I/R
Experience of using and supporting others in the use of financial software packages, including a working knowledge of PS Financials and IMP.		X	A/I
Experience in working in a similar role and environment.	X		A/I/R
A minimum of 5 years' experience of managing staff.		X	A/I
Experience of managing budgets.	X		A/I/R
Experience of communication with colleagues and contractors at all levels of the organisation and the ability to negotiate and act on behalf of the MAT in relation to contracts.	X		A/I
Experience of managing payroll and working with HR to develop efficient processes.		X	A/I
Knowledge and experience of acquiring grant funding.	X		A/I
Experience in project management.		X	A/I
Experience of managing/overseeing investments and an understanding of 2023 procurement regulations to ensure compliance.	X		A/I
Experience of leading organisational and financial transformation in a complex, publicly funded education environment, working collaboratively to deliver sustainable improvements.	X		A/I

Professional Knowledge and Skills			
Significant post-qualifying experience and in-depth professional knowledge acquired through experience.	X		A/I
Thorough understanding of Educational and MAT finances and the ATH.	X		A/I
High level of IT competence, literacy and numeracy skills.	X		A/I
In depth knowledge of statutory requirements, procedures and regulatory requirements relating to academies.	X		A/I
Strong persuasive, influencing and interpersonal skills with the ability to communicate clearly and confidently at all levels.	X		A/I/R
Excellent skills in strategic planning and strategic management of financial resources.	X		A/I
Clear analytical skills to allow the exploration, evaluation and interpretation of information and opinions and utilisation of management information systems.	X		A/I
Knowledge of financial accounting and contracting procedures and practices.	X		A/I
A detailed understanding of Health and Safety Legislation and recent experience of application across an organisation.		X	A/I
Understanding of safeguarding and child protection issues and procedures.	X		I
Personal Qualities			
Good leadership skills and ability to inspire and challenge colleagues and hold others to account.	X		I/R
Strong decision-making skills with the ability to make decisions and recommendations based on the analysis of options.	X		I/R
Commitment to others' and own personal and professional development.	X		I/R
Flexible in terms of working patterns and evolution of the role.	X		I
Highly developed interpersonal skills and emotional intelligence, with the ability to enthuse and motivate others and develop effective partnerships.	X		I/R



Capacity to work under pressure to meet deadlines and organisational priorities.	X		I/R
Capable of multitasking, problem solving and delivering to strict deadlines.	X		I/R
Exceptional communication skills.	X		I/R
Capable of delegating, motivating across different areas and guiding team effort towards efficient productivity and meeting objectives.	X		I/R
A keen positive and enthusiastic team player who is approachable and amicable.	X		I/R
Aware of and committed to equal opportunities.	X		I/R
Committed to the Mowbray Education Trust values and aims.	X		A/I
Other			
Understands and actively promotes the benefits of diversity within the Trust.	X		I/R
Is fluent in the use of the English language.	X		A/I/R
Able to travel between Trust settings.	X		A/C



Section 4: Application and Interview Process

If you would like to have an initial discussion about the role, please contact Anna Butler, Executive Lead for People and Development, at: futuretalent@mowbrayeducation.org.

Closing Date: Midnight, Tuesday 26th August 2025

Application forms and further information can be found on our careers site:
<https://mynewterm.com/trust/Mowbray-Education-Trust-Limited/137617>

Mowbray Education Trust reserves the right to close adverts early if sufficient applications are received.

Mowbray Education Trust embraces and welcomes diversity and equality.

Mowbray Education Trust is committed to safeguarding and promoting the welfare of its pupils and expects all those working within the Trust to share this commitment. All roles are subject to full pre-employment safeguarding checks, including an Enhanced DBS with Barred List check.

Mowbray Education Trust ~ Children First