



Chief Financial Officer

Recruitment Pack



A welcome letter from our CEO

Thank you for your interest in joining The White Horse Federation at this important and exciting time for the Trust. This is a significant opportunity for a CFO to lead at the very heart of our organisation, supporting our strategic direction and enabling a high-performing Trust. Working closely with the CEO, this role is an integral part of the Executive Team, which is ambitious to build a great place to work and an organisation that enables all children to achieve and thrive.

The Trust is a family of 30 schools with an excellent Professional Services team that works closely together to support and inspire all children and colleagues, offering greater opportunity and choice. The Trust aims to be a deeply connected, collaborative, and supportive organisation that creates the conditions for all colleagues to influence the lives of children positively.

The Trust enjoys a strong and growing reputation. As one of the most mature Trusts in the sector, with a significant track record of school improvement, this is an excellent opportunity and time for a motivated and committed individual to join us. Over time, the Trust has achieved substantial progress, with all 30 schools now graded at least 'Good' by Ofsted—compared to just 50% when they first joined. This summer, all key performance indicators improved and are now above national averages.

The Professional Services teams are strong, experienced, and supported by mature systems and approaches. This team provides a robust platform for schools to deliver high-quality provision and make a real difference in the lives of all children. This role is pivotal in driving further improvement within Professional Services. It is a high-profile position that works collaboratively across the Trust—with Trust leaders, Professional Services, the School Improvement team, and senior leaders in every school.

This is an exciting time to join the Trust as we anticipate future growth. The strength of our schools, Professional Services, outcomes, and other key measures means that growth is both desirable and well-supported. The CFO will play an important role in maintaining, developing, and assessing the Trust's readiness for expansion and understanding the implications of that growth.

The financial health of the Trust has significantly improved and is now strong. This provides a solid foundation for future investment and innovation.

The Trust comprises schools across Wiltshire, Swindon, Berkshire, and Oxfordshire, including primary, secondary, and special schools, educating around 11,000 pupils and supported by approximately 1,500 colleagues. The Trust has grown and matured over time and will celebrate its 15th anniversary as an organisation in 2027.

Our mission is:

“Inspiring every child to flourish through an inclusive, all-through education that nurtures opportunity, equity, and agency for life.”

To achieve this mission, we are guided by five core values:

- **Inclusivity:** A connected organisation with a strong culture and sense of belonging.
- **Kindness:** A culture of kindness for all colleagues and children.
- **Integrity:** A moral organisation—open, honest, consistent, and fair.
- **Equity:** Providing children and colleagues with what they specifically need to succeed.
- **Resilience:** Investing in our collective strength and mutual support to tackle challenges.

We strive to be a human organisation where colleagues support and work with one another to achieve our mission and inspire the lives of all children—and colleagues—with greater opportunity and choice. Our strong Professional Services function provides a platform for schools to deliver the highest possible standards for all pupils. The Trust aims to be well-organised, collaborative, and clear in its purpose, enabling colleagues to feel part of a team, develop a sense of belonging, and bring their best selves to work.

We look forward to welcoming you to the team as our CFO. It is an exciting time to work within the Trust and contribute to our ambitious plans for the future. Please do reach out for a conversation—it would be great to connect and explore whether this opportunity is the right one for you.

Best wishes,

Dr Dan Nicholls | CEO

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The Chief Financial Officer Role

The Chief Financial Officer (CFO) at The White Horse Federation provides strategic financial leadership across the Trust, ensuring strong financial management and full compliance with regulatory requirements. As a key member of the Executive Leadership Team, the CFO plays a central role in shaping the Trust's financial strategy, supporting sustainable growth, and driving operational excellence.

The role involves overseeing budgeting, forecasting, financial reporting, and audit processes, while leading innovation in financial systems and procurement. This includes the effective use and development of Sage Intacct, the Trust's current financial management system, to enhance reporting, automation, and decision-making. The CFO ensures value-for-money across Trust operations and supports the onboarding of new academies through financial due diligence. They are responsible for maintaining robust financial policies and systems, and for embedding quality assurance procedures to ensure compliance.

The CFO also plays a critical role in ensuring compliance across the Trust by embedding sound financial practices that align with statutory and regulatory requirements. This includes adherence to the Academy Trust Handbook, Charity Commission guidelines, Companies House regulations, and financial reporting standards. In addition, the CFO promotes a culture of accountability, transparency, and ethical conduct throughout all financial operations, while ensuring robust data protection, safeguarding integration, and audit readiness across the organisation.



Job Description

Employment Details:

Job Title: Chief Financial Officer

Reports to: Chief Executive Officer

Salary Band: Executive 3 £118,225 - £158,433

Safeguarding Commitment:

The White Horse Federation is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment. We therefore expect all staff and volunteers to work to and within school policies and procedures, including safeguarding, child protection and health and safety.

This post is subject to satisfactory references which will be requested prior to interview, an enhanced Disclosure and Barring Service (DBS) check, medical clearance, evidence of qualifications and verification of the right to work in the UK.

Purpose of the Role

To provide strategic financial leadership across the Trust, ensuring robust financial management, compliance with statutory and regulatory requirements, and alignment with the Trust's strategic objectives. The CFO will be a key member of the Executive Leadership Team, supporting sustainable growth, performance and operational excellence, including the production and dissemination of KPIs for school leadership teams in a timely and easily conveyed manner to drive school and Trust improvement.

Responsibilities

Key Responsibilities:

- Lead the development and implementation of the Trust's financial strategy, aligned with its educational and operational goals.
- Contribute to the Trust's strategic development, including resource planning, income generation, and organisational improvement.
- Ensure compliance with the Academy Trust Handbook, Charity Commission, Companies House, and other regulatory bodies.
- Continuously strive to improve financial management and performance across the Trust, through reliable, timely, accurate and consistent financial information.
- Develop, plan and embed financial management practices, policies and controls that reflect best practice and promote effective due diligence.
- Communicate with clarity across the Trust to secure strong financial compliance, procedural understanding and financial literacy.
- Lead financial innovation, including benchmarking, value-for-money analysis, and continuous improvement of financial systems
- Oversee the preparation of annual budgets, three-year forecasts, and monthly management accounts
- Provide financial reports and strategic advice to the CEO, Board of Trustees, and Finance/Audit Committees.
- Manage internal and external audit processes, ensuring timely and accurate reporting.
- Monitor and analyse key performance indicators and prepare a financial performance dashboard, identifying areas of concern for further review and recommending appropriate remedial action across the Trust.
- Lead procurement strategy and ensure value-for-money across Trust operations.
- Support due diligence and financial planning for growth, including onboarding new academies.

- Oversee pensions, VAT, and treasury management.
- Develop and maintain financial policies, procedures, and systems (e.g., Sage Intacct and Planergy)
- Embed Trust-wide quality assurance procedures to achieve financial compliance.
- Ensure that the Finance team have the relevant capacity, skills, knowledge, dynamism and focus to adapt to the evolving customer needs of the Trust.
- Produce financial reports for submission to the DfE, ensuring accuracy and compliance.

Safeguarding Responsibilities:

- Ensure that financial policies and procedures support the Trust's safeguarding culture, including safe recruitment practices and secure handling of sensitive data.
- Promote a culture of vigilance and accountability across all financial operations.

Additional Duties and Responsibilities

The principal responsibilities and tasks as set out above are not intended to be exhaustive. The need for flexibility, accountability and team working is required. The post holder is expected to carry out any other related duties that are within the employee's skills and abilities, commensurate with the post's grade and whenever reasonably instructed.

The post holder will respect the need for confidentiality at all times while performing this role.

The post holder must at all times carry out their responsibilities with due regard to Trust policy and arrangements for Health and Safety at Work.

All staff within The White Horse Federation will be expected to accept reasonable flexibility in working arrangements and the allocation of duties to reflect the changing roles and responsibilities.

Safe Working Practices with Children

It is the responsibility of each employee to carry out their duties in line with The White Horse Federation's ethos and culture of safe working practices for adults working with children and be sensitive and caring to the needs of the disadvantaged, promoting a positive approach to a harmonious working environment. Each employee should act as an exemplar on these issues and must, where appropriate, identify and monitor training for themselves and any employees they are responsible for.

General Data Protection Regulations

The post holder is required to comply with GDPR regulations and to maintain awareness of Trust policies and procedures in this area. Attention is specifically drawn to the need for confidentiality in handling personal data and the implications of unauthorised disclosure.

Equality and Diversity

There is a requirement for the post holder to promote the equality and diversity agenda within their own role and areas of responsibility and across the department. In fulfilling the requirements set out in this job description, the post holder will apply The White Horse Federation's commitment to equality by treating all employees fairly and without discrimination.

This job description sets out the duties of the post at the time when it was drawn up. Such duties may vary from time to time without changing the general character of the duties or level of responsibility entailed. Such variations are a common occurrence and cannot in themselves justify a reconsideration of the grading of the post. The job description will be reviewed regularly to ensure that it relates to the role being performed and to incorporate reasonable changes that have occurred over time or are being processed. Any review will be carried out in consultation with the post holder before any changes are implemented.

Person Specification

Qualifications and Training

| Essential | Desirable |
|---|--|
| Professional accountancy qualification (e.g., ACA, ACCA, CIMA, CIPFA) | Leadership and Management qualifications |

Skills and Experience

| Essential | Desirable |
|--|--|
| <ul style="list-style-type: none">• Significant post-qualification experience in senior financial leadership, ideally within the education or public sector.• Proven track record of strategic financial planning and operational delivery in a complex organisation.• Experience of leading and developing high-performing teams.• Strong analytical skills and ability to present complex financial information clearly to non-financial stakeholders.• Excellent interpersonal and communication skills, with the ability to influence at all levels.• Commitment to the principles of public service (selflessness, integrity, accountability, etc.)• A confident and pragmatic decision-maker and trusts own judgement even when working under pressure• Proven attention to detail and the ability to work on a variety of tasks simultaneously• Self-motivated, resilient and calm with the ability to manage a demanding workload and deliver results• Proven ability to lead change and innovation | <ul style="list-style-type: none">• Experience in a Multi Academy Trust or similar educational setting.• Understanding of estate management and capital funding.• Experience of income generation and commercial strategy.• Experience of integrating safeguarding considerations into financial and operational decision-making. |

Specialist Knowledge

| Essential | Desirable |
|--|--|
| <ul style="list-style-type: none">• In-depth knowledge of financial governance, risk management, and regulatory compliance.• Demonstrates a clear understanding of safeguarding responsibilities in an educational setting. | <ul style="list-style-type: none">• Knowledge of Sage Intacct or similar systems• Experience of financial due diligence and integration following mergers or academy transfers. |

Personal Traits

The successful candidate will:

- Appreciate the differences between people regardless of ability or background and treat peoples' values, beliefs, cultures and lifestyles with respect and dignity at all times.
- Understand the boundaries of appropriate behaviour when working with children and young people and always act in a way that respects these boundaries.
- Understand the principles of confidentiality and adhere to them in respect to the information available within the workplace.
- Have values that align with our mission and five core values..

