



THE ATHELSTAN TRUST

Caring, collaborative and excellent



Chief Financial Officer

Information for Applicants

The Athelstan Trust: Chief Financial Officer

The Athelstan Trust is a caring, collaborative community of 10 schools across Wiltshire, Gloucestershire and South Gloucestershire. Established in 2015, we have stayed true to our founding values and intent, which is to serve our communities by providing an excellent, inclusive education, every day.

We educate over 5000 pupils in 10 schools with more than 850 staff. Our trust includes 6 secondary schools and 4 primary schools serving a range of communities, from the Forest of Dean to the market towns of Chippenham, Chipping Sodbury, Malmesbury and Tetbury, to rural villages, to the outskirts of Swindon.

Each of our schools maintains its own identity and tailors its offer to meet the needs of the school's community and the children who attend.

A pivotal moment for The Trust

This is an exciting time to join us!

In 2025, The Trust appointed a new Chair of Trustees and CEO. At this moment of change, trustees renewed the vision and plans for the trust and agreed ambitious strategic priorities to reflect its size and ambition. The Athelstan Trust therefore embarks on its second decade with optimism and determination to deliver excellence for every pupil.

As a medium sized trust with over £50m income each year, we are developing our offer to schools and formalising systems and processes to ensure operational effectiveness, value for money, and high-quality central services. Educational excellence begins with high quality professional services which enable school leaders to focus on children, teaching and school culture.

The Chief Financial Officer

As Chief Financial Officer, you will play a critical role in the future success of The Athelstan Trust, working alongside the CEO, trustees and executive leaders to deliver an ambitious programme of transformation. We are looking for candidates who have not only strong financial acumen and a proven track record of delivery, but who can lead change and build an exceptional team.

We will provide you with opportunities for development and growth. Although not essential, an ability or willingness to lead across other areas, such as people strategy, operations, or project management, would be an advantage.

The successful candidate will be a qualified accountant with the ability to win the confidence and respect of trustees, headteachers, and staff. They will be a strategic thinker able to navigate the increasingly complex and volatile world of academy finances with a calm, measured approach.

The post is permanent, full time, 37 hours per week, 52 weeks per year. A competitive salary is available depending on qualifications, skills and experience. We support flexible working, including some working from home and compressed hours. The start date for the post is 1st June, or soon thereafter.

Purpose of the role

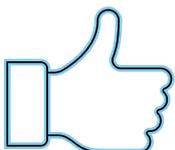
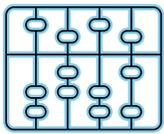
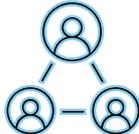
The CFO is a key executive leader who contributes to the overall leadership, development and performance of the Trust as well as their specific responsibilities.

In relation to financial matters, the CFO provides strategic vision and leadership for The Trust and its schools to support the achievement of The Trust's mission and aims, in line with its values and strategic plan. This includes:

- Working closely with the CEO to deliver educational excellence across The Trust
- To provide high quality leadership and management of the Trust's finance and business functions to enable the Trust to run smoothly, efficiently and effectively in the delivery of The Trust's core aims
- 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
- Working with the Chair and Board of Trustees ensuring the provision of key financial information to assist in strategic planning.

For further details, see the job description and person specification included in the applicant materials.

Why work for us?

				
CULTURE Our staff tell us that we are a great employer because we put people first.	FLEXIBILITY We value flexible working because it means happier, fulfilled employees.	DEVELOPMENT People have long and successful careers with opportunities to grow and develop.	SALARY We pay well by industry standards and benchmark against other Trusts.	LOCATION Our schools are geographically close, meaning face-to-face collaboration.

Our commitment to safeguarding children and young people

The Athelstan Trust is committed to safeguarding and promoting the welfare of children and young people and expects all staff to share this commitment. The successful candidate will be required to undertake an Enhanced Disclosure and Barring Service (DBS) check along with standard pre-employment safeguarding checks. As the role includes working with children, it is exempt from the Rehabilitation of Offenders Act 1974. Applicants must, therefore, disclose all spent and unspent convictions.

References

References will be sought for shortlisted candidates before interview. Please also be aware that you will be subject to an online check (see information below) and that you may be questioned about the findings of such a check at your interview.

Flexible working and equality

We are a flexible working employer and are open to requests for working arrangements which make this post manageable to suitable candidates. We are happy to make any reasonable adjustments you require during your interview also, so please ask us.

Further information

Candidates who would like to talk about this opportunity are invited to contact Matthew Evans, CEO, by email mevans@theathelstantrust.org

CHIEF FINANCIAL OFFICER – JOB AND PERSON SPECIFICATION

Responsible to: CEO

Responsible for: Financial strategy, regulatory compliance, and maintaining robust financial governance across all schools within The Trust.

Line management: Direct - Finance Director and Management Accountants

Indirect – Extended financial services team

Key Relationships: CEO, Estates Director, HR Manager, Director of Learning, Headteachers, Governance Professional, trustees, auditors, internal assurance provider, payroll provider, HMRC, DfE, Teachers Pensions, LGPS, insurance provider, finance and budgeting system providers, bank personnel, local authorities, PFI provider.

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Key Responsibilities

Strategic Financial Leadership

- Advise the CEO and Trust Board on financial strategy aligned with the Trust's strategic priorities
- Maintaining a strategic financial plan including a 3-year budget plan for The Trust
- 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
- Promote sound financial management across The Trust, ensuring The Trust operates as a going concern
- Leading transformational change to improve performance, including updating systems such as payroll and financial management packages

- Work with headteachers to develop and implement deficit recovery strategies so that all schools contribute towards the maintenance of healthy reserves
- Support other members of the Trust Central Team in the development of strategies and plans.
- Work with the CEO and Central Team to effectively manage change
- Conduct financial due diligence on schools proposing to join the Trust
- Ensure that the staffing structure, roles and expertise of the finance team support the delivery of services to schools, anticipating and planning for growth and change which maintains and improves further these services
- Ensure The Trust's financial management systems, operating procedures, and service delivery are fit for purpose.

Financial Management and Control

- Direct the annual budget process, ensuring all individual school budgets are aligned with school improvement plans
- Oversee the Trust's fixed asset register and support the Estates Director in delivering capital projects
- Manage the Trust's cash position and treasury management robustly
- Ensure that all necessary monitoring and evaluation of finance and performance is undertaken across The Trust and reported to 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
- Oversee The Trust's payroll, ensuring external and internal arrangements result in accurate and timely payment of salaries
- Act as Company Secretary for The Trust ensuring deadlines are met for all returns and publications
- Providing guidance to the Estates Director and the CEO on key purchasing decisions. Ensuring retention of quotes obtained for goods, works and services and other associated documentation such as minutes of meetings, recording of decisions and reports
- Overseeing tenders for service contracts and cost effectiveness.

Reporting and Compliance

- Prepare and share monthly management accounts (including income and expenditure, balance sheet, and 12-month rolling cash flow forecasts) with the CEO and 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 audit programme, reporting to trustees 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 insurance are in place to fully capture the needs of all the establishments within The Trust.

Leadership and Management

- Lead the Trust Finance Team, taking responsibility for their professional development and performance
- Developing and maintaining the in-house Finance Manual that sets out the operational procedures governing the Trust, combining best practice with the latest Academies Trust Handbook and Accounts Direction issued by the ESFA.
- Oversee the effective delivery of payroll and pension services (TPS and LGPS) across the Trust
- Prepare bids or tender documents to acquire identified additional funds or grants, liaising with bid preparation advisers where appropriate
- Ensure the Trust maintains adequate insurance or RPA cover
- Reviewing Trust policies, processes and procedures to ensure compliance with various external regulations including filing deadlines regarding VAT, PAYE, ESFA, DfE, HMRC, Charity Commission and Companies Acts.

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.

Other Duties

- Strategic oversight of other area/s of The Trust's work, as appropriate and required
- Any other reasonable tasks commensurate with the role as member of the Central Team to ensure the smooth running of The Trust
- 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 and participate constructively in performance management
- Adhere to the ethos of the Trust, promote the agreed vision and aims of The Trust and set an example of personal integrity and professionalism.

Elements of this job description may be changed following consultation.

Person Specification – Chief Financial Officer		
	Essential/ Desirable	How assessed*
QUALIFICATIONS		
Formal accountancy qualification (ACA, ACCA, CIPFA, CIMA)	E	AF/Cert
Qualified to degree level	E	AF/Cert
KNOWLEDGE, UNDERSTANDING AND EXPERIENCE (UP TO DATE/CURRENT)		
Significant post qualifying experience and in-depth professional knowledge acquired through experience.	E	AF/IV
Experience managing significant financial resources with a good appreciation of relevant regulatory frameworks.	E	AF/IV
Expertise in financial processes and procedures.	E	AF/IV
Experience of effectively managing a team.	E	AF/IV
Experience of delivery effective change.	E	AF/IV
Experience of working in the academy sector.	E	AF/IV
Experience of bid writing, tendering and commissioning.	D	AF/IV
Experience of onboarding schools, academy conversion, trust mergers and/or trust growth.	D	AF/IV
In depth knowledge of statutory requirements, procedures and regulatory requirements relating to academies.	D	AF/IV
High level of IT competence, literacy and numeracy skills	E	AF/IV
Experience of using and supporting others in the use of financial software packages, including a working knowledge of Sims FMS, HCSS software.	D	AF/IV
PERSONAL AND PROFESSIONAL QUALITIES		
Strong persuasive, influencing and interpersonal skills with the ability to communicate clearly and confidently.	E	AF/IV
Excellent skills in strategic planning and management of financial resources.	E	AF/IV
Clear analytical skills to allow the exploration, evaluation and interpretation of information and opinions and utilisation of management information systems.	E	AF/IV
Strong decision making skills with the ability to make decisions and recommendations based on the analysis of options.	E	AF/IV
Capacity to work under pressure to meet deadlines and organisational priorities.	E	AF/IV
Good leadership skills and ability to inspire and challenge colleagues.	E	AF/IV

Commitment to staff and own personal development.	E	AF/IV
Flexible in terms of working patterns and evolution of the role.	E	IV
Team-player, personable, and empathetic.	E	IV
Full clean driving licence	E	

***Key to how skills are assessed: AF = Skill assessed via application form. IV = Skill assessed via interview.**

Cert = Certificate checked at interview