

## **Chief Finance & Operations Officer (CFOO)**

Trust Central Office

### **JOB DESCRIPTION**

<b>Job Title</b>	Chief Finance & Operations Officer
<b>Salary</b>	Grade J Points 74 to 81
<b>Contract Type</b>	Permanent – 36.5 hours per week – Full Time, full year

#### **JOB DESCRIPTION AND PURPOSE:**

- Ensure the long-term financial and operational sustainability of Forward Education Trust.
- Comply with all MAT policies, contributing to the development and success of the Trust.
- Maintain a secure overview of the management of operations and finances within each of the schools within the Trust, providing financial advice and support to Headteachers, the Chief Executive Officer (who is the Accounting Officer) and the Trust Board.
- Keep the CEO, Company Secretary and Trust Board up-to-date with regulatory matters in respect of the Department for Education, company law, charity commission and any other relevant statutory body.
- As a member of the Trust Executive team, be responsible for development and delivery of the Trust Strategic Plan and operational leadership of the Trust.
- Uphold good governance, ethical behaviours and professional competence.

**REPORT TO:** Chief Executive Officer

**LINE MANAGEMENT OF:** Trust Business Manager (As at 2025). Currently most aspects of the Trust's finance function are outsourced to SAAF Education. The CFOO will have responsibility for direct liaison with SAAF on all financial matters. Over time, the balance of responsibilities for this role may change and at some point, the Trust may decide to bring finance functions in-house. If this is the case, line management responsibilities will change, but it is not expected that this will have a fundamental impact of the assessment of the seniority, accountabilities or evaluation of this job role.

## **DUTIES AND RESPONSIBILITIES**

### **Key responsibilities**

#### **Strategic leadership**

- Support Trust leaders, school leaders and Trustees in the development of strategy and improvement plans, ensuring that role accountabilities align with the Trust vision and values.
- Lead on finance, operations, health & safety, estates operations & risk and ICT & digital strategies. Be the main contact with the external DPO provider.
- Lead operational and financial efficiency, maximise use of resources and support fund raising across the Trust.
- Work closely in support of the Director of Education on all education objectives, maximising the allocation of resources to support the education, care and welfare of children in schools.
- Work closely in support of the Director of Governance and Development on all aspects relating to governance, risk management, matters of assurance and workforce development and planning, to support the education, care and welfare of children and the development and well-being of staff across the Trust.
- Work effectively with business partners to maximise use of resources around IT, estates, catering, facilities management and health & safety.
- In conjunction with the CEO, lead on due diligence relating to future growth prospects for the Trust, ensuring the effective use of internal and external resources during this process.
- As the Trust develops & grows, lead on operational effectiveness and efficiency with conscious thought about the core purpose of the Trust – which is educating & caring for children in our schools.

#### **Business and financial management**

- Develop and implement operational and financial strategies to support the goals of the Trust and the schools.
- Prepare and manage annual budgets and forward financial forecasts, financial and operation reports to inform the Trustees in the oversight and decision-making.
- Ensure timely and effective monthly management reporting, fulfilling the obligations within the Academy Trust Handbook and any other statutory and non-statutory guidance relevant to the responsibilities of the role.
- Implement best practice to optimise resource allocation, procurement and facilities management.
- Collaborate with Trust and school leaders and staff at every level, including all stakeholders to identify operational challenges and develop effective solutions.
- Be cognisant of Department for Education guidance around good estates management for schools, estates management competency frameworks and other aspects relating to facilities and estates management. Lead on and oversee all Trust capital projects.
- Be responsible for and cognisant of Department for Education guidance (for example the DfE Digital and Technology Standards) around ICT strategy, cyber-security risk and matters relating to acceptable use of IT for both staff and children.
- Be responsible for and cognisant of the management of risk through insurance, either RPA/RPA+ or other insurance arrangements.
- Have oversight of legal and compliance activities relating to contracts for services across the Trust.

### **Risk management and compliance**

- In conjunction with the Director of Governance & Development, develop and implement risk management strategy and policy, to safeguard the Trust's assets and reputation.
- Ensure within the scope of the role compliance with relevant legislation, regulatory requirements and reporting standards.
- Work closely with external and internal auditors and regulatory bodies to meet reporting obligations and advise Trustees about their roles and responsibilities.
- Contribute to the development and execution of the Trust's strategic plan, by aligning use of financial and operational resources to achieve organisational goals, conscious of the risk framework.
- Ensure legal compliance in respect of matters to do with company law and charity law.
- Lead the due diligence process for any future opportunities for growth of the Trust.
- Take a key role in critical incident and business continuity planning across the Trust.

### **Other Responsibilities (including safeguarding, working with Designated Safeguarding Leads and School Leaders)**

- Demonstrate commitment to safeguarding and promoting the welfare of children, young people, and vulnerable adults.
- Carry out your duties with full regard to the Trust's published employment policies.
- Comply with health and safety policies, organisational statements, and procedures, undertake to report any incidents/accidents/hazards and to take a proactive approach to health and safety matters in order to protect both yourself and others.
- Engage positively in your own professional and personal development, which the Trust will support as part of its Employee Value Proposition.
- Contribute to the overall aims and ethos of the Trust and establish constructive relationships with the Trust's schools.
- Any other duties as commensurate with the post.

### **ANNUAL LEAVE**

1. Annual leave entitlement is currently 26 days. There is an expectation that up to 5 days annual leave may be needed to cover the Christmas closure period.
2. There will be an opportunity for term-time leave, limited to no more than 5 days per annum.
3. There is an expectation that the postholder will not take annual leave at a time when business pressures would make it unwise to do so, for example for completion of the annual audit and/or statutory reporting returns.
4. The Trust adopts a positive approach to flexible working, in respect of location, time of start/finish and other factors. There will be expectations about time on site (in the Central Office or in schools) to build cohesive team rapport and relationships. Postholders will agree arrangements with the CEO.

### **REVIEW AND AMENDMENT**

This job description is normally subject to annual review. It may be amended at the request of the CEO or the post holder but only after full consultation with the post holder, to reflect or anticipate changes in the job commensurate with the grade and job title. It is current at the date shown and the role has recently been independently evaluated in respect of responsibilities and pay range, in accordance with the Trust's normal processes.

## **PERSON SPECIFICATION**

### **JOB TITLE - Chief Finance & Operations Officer (CFOO)**

Where are criteria tested? A/F = application form, I = interview, R = references T = task

<b>Criteria</b>	<b>Essential</b>	<b>Desirable</b>
Education, qualification and professional development	<p>A suitable financial accounting qualification (A/F)</p> <p>Detailed and up-to-date knowledge of accountancy and professional codes of practice (A/F and I)</p> <p>Understanding of charity and company law (A/F)</p> <p>Evidence of continuing professional development, ability to identify own learning needs (A/F)</p>	<p>ACCA, ACA, CIMA or CIPFA level 7 (A/F)</p> <p>A management qualification (minimum level 5) (A/F)</p> <p>Experience of asset management (A/F and I)</p>
Experience, professional skills and knowledge	<p>Proven track record of senior financial management and strategic leadership (A/F and I and R)</p> <p>Experience of presenting complex issues to others who have little or no financial expertise (A/F and I, T and R)</p> <p>Experience of working with ESFA, MATs and LAs (A/F and I and R)</p> <p>Experience of project management (A/F and I and R)</p> <p>Significant experience in working with external stakeholders, particularly around external and internal audit, to support strong financial management of the Trust (A/F and I and R)</p> <p>Experience of leading procurement and managing contracts (A/F and I and R)</p> <p>Highly effective communication, interpersonal and presentation skills (A/F and I, T and R)</p> <p>High levels of analytical skills and good judgement (A/F and I, T and R)</p> <p>Evidence of strong IT and numeracy skills around Excel and management accounting software commonly used in the education sector (e.g. PSF or IMP) (A/F and I, T and R)</p>	<p>Ideally within the Academy Trust sector and with evidence of understanding of funding relating to special educational needs (A/F and I and R)</p>

<p>Personal qualities and attributes</p>	<p>Ability to build strong working relationships based on mutual trust and clear understanding of roles and responsibilities (A/F and I and R)</p> <p>A team player, who is flexible, adaptable and calm under pressure (A/F and I and R)</p> <p>Principled and aligned to Nolan principles (A/F and I and R)</p> <p>A deep belief that we want children in schools to be the best they can be and a motivation to work with children with SEND (A/F and I and R)</p> <p>Behaviours that align to Forward Education Trust's behaviours (A/F and I, T and R)</p> <p>A commitment to safeguarding for children (A/F and I)</p> <p>Driving licence, own transport and a willingness to be in schools (A/F)</p> <p>Capable of multi-tasking, problem-solving and meeting strict deadlines (A/F and I, T and R)</p>	
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