



**Central Co-operative Learning Trust**



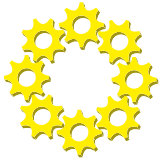
# CHIEF FINANCE OFFICER CANDIDATE PACK



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# Central Co-operative Learning Trust

## Welcome

Thank you for your interest in this exciting opportunity to join our Trust and be part of our central team. This crucial role in the Trust will help us to continue to fulfill our aims and improve the lives of the young people we work with.

I would like to welcome you personally and I hope that the information provided will inspire you to join our team.

We are a young, vibrant Multi Academy Trust established by three founder schools, John of Rolleston Primary, Outwoods Primary and William Shrewsbury Primary, in November 2017. Since then we have grown by reputation and local links and we now have nine primary phase schools, soon to be ten. Six schools are located in Staffordshire and three in Walsall with one in South Derbyshire. Continued growth is anticipated with interest from schools in Staffordshire, Walsall and Derbyshire.

Underpinned by the Co-operative values we operate with a strong collaborative culture and ethos. Our entire workforce is dedicated to our core aim of providing the highest quality education for all the children in our schools, through effective teaching and outstanding learning experiences and opportunities.

Our current CFO has been with us since the inception of the Trust and has built a strong foundation for continued growth and development. Our central team has a wide range of experience and skills which we hope our new CFO will add to.

I am proud and delighted to be leading our Trust as it grows and expands. This is a very exciting time in our development. We have a considered and sustainable approach to growth as we seek to work with likeminded school leaders who share our values and aspirations for all young people. Be part of the team that makes a difference to thousands of young people and their families.

I look forward to receiving your application and discussing the contribution you can make to our communities.

**Richard Simcox**  
CEO



# Welcome

## FROM THE CHAIR OF TRUSTEES



Dear Candidate,

Thank you for your interest in the post of Chief Finance Officer (CFO) at Central Co-operative Learning Trust.

Our trust is passionate about primary education and working collectively to ensure that all our children receive high quality education to achieve the best possible outcomes, whilst recognising and celebrating the unique qualities of each individual academy.

Starting out with three academies upon formation, the Trust has experienced steady growth to its current state. Presently, there are nine primary academies in the Trust with one more primary set to join soon. This has been part of a strategic plan to create a strong multi-academy trust where each member feels valued, and successes can be shared to raise aspirations, achieve excellence and promote community cohesion.

All the work we do is underpinned by the Co-operative values. We are looking for somebody who can continue to ensure that the Co-operative values permeate through everything we do across the Trust.

Central Co-operative Learning Trust has an excellent board of Trustees who bring a wide range of expertise and experience of governance, and each school maintains its own local governing body. This enables a strategic overview of the schools without losing the core school function of serving the local community.

We were recently selected for a Multi-Academy Trust Summary Evaluation (MATSE) visit from Ofsted. I would urge you to read the findings from the MATSE [here](#).

This is a fabulous time to be joining our Trust. Having experienced positive Ofsted outcomes at academy and Trust level, alongside the sustained and methodical period of growth, we feel that this role is a perfect opportunity to further enhance our provision for pupils, to maximise the sharing of expertise that exists, and to drive all work through the Co-operative values.

If you would like to discuss the role prior to applying, then please contact Neil Massie at Academicis in the first instance by email on: [nmassie@academicis.co.uk](mailto:nmassie@academicis.co.uk)

Thanks again for taking the time to consider our Trust as the next step in your career. My fellow Trustees and I look forward to reading your application in due course.

Yours sincerely

**Mr Trevor Sutcliffe**  
Chair of the Board of Trustees



# Central Co-operative Learning Trust

Our Trust is presently made up of nine primary phase schools. The schools are based in Staffordshire and Walsall and serve a wide variety of different communities.

## OUR SCHOOLS



Blackwood School teaches 700 children aged between 3 and 11 years of age, aiming to help them become, independent, confident, kind, and well-rounded young citizens. We want them to be academically successful, to allow them choice in their future, educated to celebrate differences and live without prejudice. Our nursery accommodates 78 children, most of whom come through into the main school. We have a lower than average number of children on the SEN register, some children have an EHCP to help meet their needs. The number of children with English as an additional language is increasing as our school population becomes more multi-cultural. We are multi-denominational but are also proud of our wide community connections. Our children are well behaved and eager to learn. Parents are keen to be involved in their children's education.

Brownhills West Primary is a friendly smaller than average one-form entry school situated on the edge of Brownhills, on the border of Walsall and Staffordshire. The school population is mainly composed of white British children. The proportion of pupils who are eligible for free school meals and the pupil premium funding is well above average.



We are a safe, happy and nurturing school, where all children are encouraged to aspire through our DREAM BIG values (Determination, Respect, Empathy, Acceptance, Motivation, Be positive, I am the best I can be, Give and Take). We encourage all our pupils to use a growth mindset to be their best possible self, whilst at the same time accept and celebrate each other's differences. At Brownhills West, we have a caring and dedicated team who have high expectations of all our children. We nurture our children's emotional well-being, whilst challenging them academically, as we know children need to be in the right place in order to achieve and succeed. We also encourage our children to develop positive relationships with each other in order to develop as respectful and responsible citizens. We work hard to build positive partnerships with our families, in our vision for everyone to DREAM BIG and for children to leave school with an ambition to become somebody.



Burton Fields School is situated in the Shobnall Ward of Burton-upon-Trent, an area of high social deprivation. We are a two-form entry junior school, currently having 180 pupils on roll. We are a diverse but inclusive school community, with high levels of pupil mobility. 42% of pupils are eligible for Pupil Premium, 60% of pupils speak English as an Additional Language, with 16 languages being spoken across the school, and approximately 45% of our pupils are of the Muslim faith. As a UNICEF Rights Respecting School, we believe that all children have the right to an education that enables them to reach their full potential: academically, socially and emotionally. With this in mind, we aim for all our children to be:

- Successful learners who enjoy learning, make progress and achieve well
- Confident individuals who are able to lead safe and healthy lives
- Responsible citizens who make a positive contribution to society

Grange is a warm and welcoming larger than average-sized infant school in the middle of Burton - upon - Trent. Through our values of being Ready, Respectful and Safe, our children learn how to be effective learners and kind and helpful members of the school and local community. We are a happy, caring and friendly school where all children are encouraged to do their best and 'reach for the stars'. All of our pupils are encouraged to develop as individuals, so that they can fulfil their own personal potential, whilst at the same time recognise and celebrate each other's differences. The proportion of pupils from ethnic minority backgrounds is significantly above the national average, with many pupils at the early stages of English language acquisition. The proportion of pupils who are eligible for the pupil premium funding is well above average.





Greenfield Primary School is a one and a half form entry Primary School situated in Sheffield, Walsall. We welcome children aged 3 to 11 years old - from Nursery to Year 6. As we have 45 children in each year group, this means that in each teaching phase, from year 1 upwards, we have 3 classes of 30 and these may well be mixed age groups of children.

The school has a 26 place school nursery and around 270 children aged from 4 to 11 year olds. The school has playgrounds on both sides of the school, two large sports fields, a large adventure playground with a wooded area, a library and a children's kitchen. There is a hall which is used for Collective Worship, dance, music, gymnastics, games, drama and school productions, as well as for school lunches. We work closely with our community partners, Police service, PCSO's, Fire Service, Library Services and St Marks Church, Sheffield. Our ethos seeks to promote Christian values and morals whilst being sensitive to the range of cultures present within our school and community.



John of Rolleston is a large two form entry primary school set over two sites at the heart of the beautiful village of Rolleston. We provide an exciting education for the surrounding areas. The school is a happy, safe and vibrant place to learn and find the passion that drives learning and thinking into future careers. Our children and our school values sit at the centre of school life and are the driving force behind our decision making, this is how our values become living and not laminated. Whilst we strive for academic excellence we also recognise the importance of growing as human beings, our circle time, peacemaker, values and PHSE learning brings this to life. The children and staff at John of Rolleston value and take care of one another in a caring environment. We believe that every child can be whoever they want to be and do whatever they want to do in the future, which in turn gives everyone a wonderful opportunity for a fulfilled and happy life.



Outwoods Primary School is at the heart of our local community providing a safe, happy and secure learning environment for all of our children. We are proud of our warm welcoming school, which builds on positive relationships and strong parent partnerships.

We celebrate diversity within our school and value the different cultures, religions, and backgrounds that contribute to making our school family unique. We believe that every individual brings strengths to our school that are valued. As a community, we strive to ensure that the children get the very best chance of success. They only get this one chance and we believe that they deserve this to be the very best that we can offer. This is their entitlement - an ambitious exciting curriculum that is equitable is on offer and immerses the children in to engaging learning experiences. We grow enthusiastic, inquisitive, and resilient learners, who are independent, active in their learning and embrace challenge. By the end of their Outwoods' journey, their experiences will have provided the children with the opportunities to aspire to be more and have the awareness and initiative to achieve their full potential. We develop children who have a life-long love of learning and will have made memories to last a lifetime.

Redbrook Hayes is a one-form entry Primary with a 2 to 4 year old Nursery at the heart of its amazing community in Brereton, near to Rugeley. The school seeks to create an inspiring learning adventure for every child, empowering every one of them to realise their limitless possibilities. They are recognised for their highly inclusive practices and are proud of their commitment to understand every child as an individual, taking every possible step to meet their needs. As a result, Redbrook's learners and families are positive, hardworking and committed to high levels of aspiration in a climate of kindness and support.

The school's ethos is based firmly in empowering one another through high levels of aspiration in a safe and nurturing environment. They believe that happiness and a shared moral purpose inspires everyone to excel, and as such the culture is one of possibility and commitment. Standards are high because every single member of the community strives to support one another to achieve more than they could have dreamed. It is a very special place to work and learn, and there is a shared pride in their amazing learning community.



William Shrewsbury is a large three form entry school with 670 pupils in Burton upon Trent.

We are a caring, supportive community which aims to give all children a wide range of exciting experiences through a broad and varied curriculum. We address the needs of each individual to build confident, independent life-long learners who have the skills, knowledge and resilience to achieve strong academic outcomes. We have an inclusive ethos and support all children to make good progress and to become caring, contributing members of their community through our REACH OUT values and our Five Golden Rules. The majority of pupils are of White British heritage with around 17% of children from 12 different minority ethnic backgrounds, with 15% pupil premium (92 pupils). The proportion of pupils with learning difficulties or disabilities is usually below average but the proportion can vary significantly between year groups. The school has a strong inclusive ethos and as a result, attracts parents of children with quite complex special needs.

# Who we are

## BELONGING

'beyond self' - Vision, Values, Culture and Ethos



## PURPOSE

'what we aspire to achieve' -  
Outcomes through great curriculum and effective teaching

GOAL



## CONNECTED

'the trust is the school the school is the trust' - How we work together



## THE VISION

Children are at the heart of all that we do.



Through high standards and expectations our Trust provides an education which encourages and inspires a love of learning, with limitless possibilities for every individual to be the best they can be. Through the embodiment of the Co-operative Values, we are committed to understanding and developing the whole child, enabling them to become enlightened, productive and responsible citizens. Working collaboratively, we innovate and share exceptional practice to raise aspirations, achieve excellence and promote community cohesion. To communicate the complex aspects that require deep thinking we have simplified our messaging to deliver our vision.

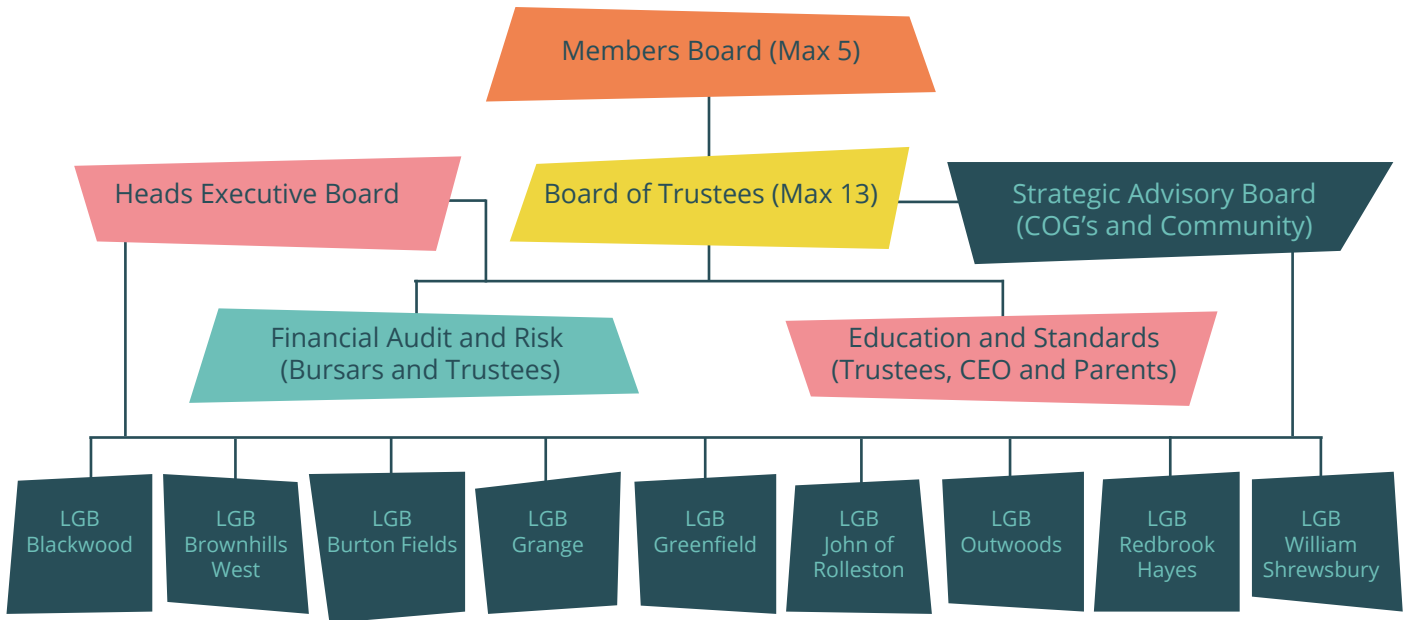


**BELONGING  
PURPOSE  
CONNECTED**  
ARE OUR MANTRA

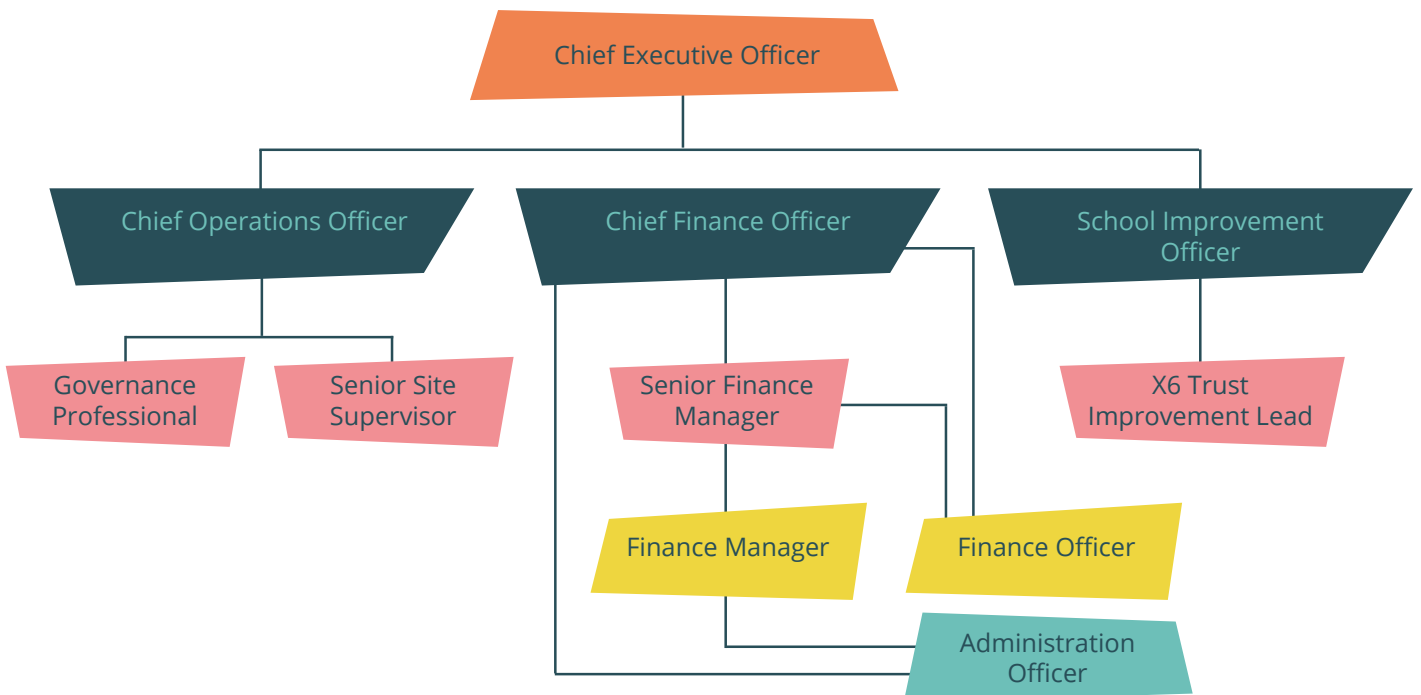


# Structure Tables

## SCHEME OF DELEGATION STRUCTURE



## CENTRAL TEAM STRUCTURE





# CFO Job Description

## **POST TITLE:** CHIEF FINANCE OFFICER / CFO

37 hours per week (flexible and/or hybrid working considered)

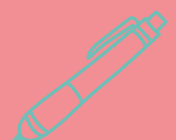
Salary: Competitive and commensurate with experience



## **OVERALL PURPOSE OF THE POST**

The post-holder will provide leadership and management on all aspects of finance, and will play a pivotal role in providing clear financial and commercial strategy and direction for the Trust, acting as the CFO in line with the Academy Trust Handbook. The post-holder will be fully aware of all funding and legislative changes that apply to the education sector and advise the Trust Board on strategic financial information to enable them to make informed decisions. S/he will be responsible for managing all budgeting and accounting activity, the line management of the finance function, ensuring all systems are updated and reporting is timely and in line with required annual returns. In addition, you will coordinate the work of the external auditor and prepare and submit audited, statutory, consolidated accounts.

As a key member of the central team, the CFO will play an important part in setting and achieving the CCLT strategy. S/he will report to the Chief Executive Officer and Board of Trustees, and will work closely with the Chief Operating Officer, along with other members of CCLT's central team, to ensure effective Trust leadership that best serves the children and young people in our communities.





## MAIN DUTIES AND RESPONSIBILITIES

- Monitor financial performance and drive change within the finance operation of the trust, striving to ensure maximum efficiency for the trust
- Ensure that the trust is compliant with all requirements from the DfE, HMRC, Charities Commission, ESFA and the Academy Trust Handbook
- To ensure all statutory returns are completed and submitted in agreed timescales, to include annual statements and academy budget forecast returns.
- Be aware of and keep ahead of funding and legislative changes that apply to the education sector and provide the Board of Trustees with strategic financial information and reports to enable them to make informed financial decisions
- Ensure accrual-based monthly management accounts are produced and shared with the CEO
- Lead and line manage the finance function (including the central finance team and academy based staff), including managing all the financial accounting and transactional finance for the Trust
- Lead the budget planning/forecasting process (1 – 5 years), at individual academy and trust level
- Ensuring all finance-related systems are up-to-date and reporting is timely and in line with required annual financial returns
- Co-ordinate the work of the external auditor to prepare and submit audited statutory consolidated accounts
- Establish and monitor effective procurement procedures in order to achieve financial efficiencies, including overseeing the tendering process
- Ensure the trust complies with financial regulations and standards, working with the CEO in their capacity as accounting officer
- Oversee the trust's commercial contracts, ensuring the represent value for money
- Ensure most efficient use of all income streams to maximise resources available for the trust, including GAG funding, SCA, SEND funding and DFC
- With the Chief Operations Officer ensure robust systems, processes and controls are implemented and a fixed asset register and risk register maintained
- Support the COO to implement income generation strategy and systems

2+2=4  
ABC



## Continued

- Develop and mentor colleagues undertaking relevant CPD, for example, AAT, ACCA, ACA, CIMA etc.
- Regularly visit CCLT Trust academies to develop a good working knowledge of each academy and how they serve their communities, to ensure effective budget management that will best serve the needs of the students/pupils
- Ensure an effective Risk Register, Asset Register and Scheme of Delegation is in place and kept up-to-date
- Lead on financial aspects of any academy conversion, to include due diligence and managing the effective introduction of financial systems and processes for new academies joining the trust

## GENERAL DUTIES AND RESPONSIBILITIES

All CCLT Trust staff are expected to:

- Promote and support the aims, ethos and vision of the academy/trust;
- Conduct themselves in line with the CCLT Trust Co-operative values, treating others with dignity and respect;
- Develop and maintain effective working relationships with staff, students and others, as appropriate for the role;
- Remember that their prime responsibility is to the children, families and communities that the Trust serves, and ensure all decisions and actions taken during their work is with this in mind;
- Ensure that safeguarding policies are financially supported.
- Attend appropriate CPD and actively seek to broaden knowledge and skills;
- Appropriately maintain the confidentiality of the working environment;
- Comply with all CCLT Trust policies and procedures;
- Comply with all statutory guidance as relevant for their role, including the Health and Safety at Work Act 1974;
- Work in a flexible manner, undertaking any reasonable duties commensurate with the salary and grade of the post;
- Hold a full and valid driving licence, and be willing to travel as required for the role;
- Work in other CCLT Trust academies, as required (with travel payment if appropriate).

- The purpose of this job description is to provide an overview of the duties and responsibilities involved in this role, however, it is not intended to be exhaustive. In consultation with the post holder, this may be reviewed and could be subject to change during the course of employment



# Person Specification

Post Title: Chief Finance Officer / CFO	Essential	Desirable
<b>General Qualifications &amp; Training</b>		
5 GCSE grades A-C and 2 A levels or equivalent	•	
Fully qualified accountant (ACCA, ACA, CIMA, CIPFA)	•	
Minimum of ten years post qualification experience	•	
Commitment to attend appropriate training and development, taking ownership of personal development and being willing to pursue development opportunities	•	
<b>Experience</b>		
Relevant post qualification experience in both financial management and accounting at a senior level	•	
Demonstrable business acumen and commercial experience	•	
Experience of working in a multi-academy trust environment, with an understanding of the all aspects of school finance		•
Extensive prior experience of producing budgets, management accounts and statutory accounts	•	
<b>Skills, Knowledge &amp; Aptitudes</b>		
Solid knowledge of financial analysis and forecasting	•	
A basic knowledge of employment law and GDPR		•
Strategic planning, management and business process skills	•	
The ability to explain complex accounting concepts in simple terms to non-finance colleagues	•	
The ability to provide advice and guidance, offering business focused solutions	•	
Proven track record of developing and implementing financial policies	•	
Able to remain calm under pressure	•	
Excellent IT software skills, including Microsoft packages and bespoke finance/ budgeting packages	•	
Commitment to the promotion of positive values, attitudes and behaviour	•	
<b>Personal Attributes</b>		
Confident operating at Board level	•	
Highly effective in multi-tasking and personal organisation	•	
An analytical mind with strategic ability	•	
Outstanding communication and interpersonal skills	•	
Excellent leadership and management skills	•	
A team player	•	
Discrete when dealing with sensitive and / or confidential matters	•	
<b>Other Requirements</b>		
A pragmatic 'can-do' and flexible approach to tasks with an ability to ensure work is completed to the appropriate standards required	•	
Full driving licence and own transport, with willingness to attend different CCLT Trust sites	•	
Appointment of the successful applicant will be subject to satisfactory DBS disclosure at an enhanced level (further information can be found at <a href="http://www.disclosure.gov.uk">www.disclosure.gov.uk</a> ). In line with KCSIE social media checks will be undertaken. Satisfactory occupational health surveillance.	•	



## HOW TO APPLY

If you wish to discover more about this exciting opportunity, need any further information or would like to have an informal discussion, please contact Neil Massie at Academicis, our recruitment partner, on [nmassie@academicis.co.uk](mailto:nmassie@academicis.co.uk) or by phone on 07818 875514 / 01223 907979

**Closing date:** Noon on 9th January 2024

**Shortlisting:** Wednesday 10th January 2024

**Interviews:** w/c Monday 15th January 2024

