



**EXCEL  
LEARNING  
TRUST**



**Chief Finance Officer**  
Candidate Pack

*A*CADEMICIS  
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## Welcome Letter

**Dear Applicant**

**Thank you for your interest in Excel Learning Trust.**

It is my absolute privilege to be the Chief Executive Officer of Excel Learning Trust and I am really excited that you are interested in joining our Trust as Chief Finance Officer, following the retirement of our current post holder.

I became a teacher because I wanted to give every child the opportunity to change the world. I became CEO for the same reason. Therefore, I am looking for a CFO who is absolutely committed to ensuring that all children experience educational excellence every day so that they can change the world.

As a Trust, we are committed to:

- the pursuit of excellence and the highest expectations for our children;
- academic outcomes and personal development for each child in line with our vision and values;
- continuous improvement for our schools through the Excel School Improvement Model.

If you share our beliefs and priorities and are excited by this vital leadership role and want to make a real difference to children, I would very much welcome an application from you. Please get in touch for an informal discussion about the role.

**Mark Hassack**  
CEO



## Our Vision and Values

**Our vision is very simple:  
Ensuring Excellence**

**All Excel Learning Trust schools  
are committed to our EPIC values**

**E**

**EXCELLENCE** and a sharp focus on outcomes

Our vision of ensuring excellence is for children, parents, staff, local governing boards, trustees and the wider community. We will always keep this front and centre in all that we do. It applies to all aspects of our work.

**Outcomes:** We believe that by focusing tirelessly on outcomes for our children, for academic and personal development, we will ensure that their life chances and life choices are maximised.

**P**

**PEOPLE** and character

We recognise that it is in our children's best interests to recruit, retain and develop the very best staff in our schools. We continuously develop our staff to be masters of their craft. Any growth of the trust will depend on developing genuine capacity in advance of need to ensure that both new and existing schools ensure educational excellence every day.

**Character:** For our children, we are committed to character education as we are to academic outcomes; developing a visibly strong, pervasive ethos of aspiration in our schools. We foster a strong, shared sense of pride in belonging to an aspirational school community. We ensure that our curriculum enables children to develop their independence, creativity, reflective thinking, team working skills, self management and effective participation. We expect kindness from every adult and child – even when it's difficult; especially when it's difficult.

**I**

**IMPROVEMENT** through collaboration

We believe in a clear model for continuous school improvement across our family of schools: **The Excel Learning Trust School Improvement Model**. This is underpinned by an ethos of open accountability and genuine transparency. This best enables us to ensure educational excellence every day for our children.

**Collaboration:** Our schools are equal partners committed to true collaboration. We agree on best practice in all aspects of our work and then work together to make this world class. We also believe in our civic role and in collaborating beyond the trust for the benefit of children.

**C**

**COMMUNITY** and inclusivity

We believe that a school is at the heart of its community. As well as ensuring that the trust's vision and values are realised, schools have agency to retain and develop their own unique character, culture, ethos and community links. We believe this is in the best interests of the children and communities we serve as a trust.

**Inclusivity:** We strive for all our schools to be truly inclusive and we believe the diversity of our community makes our schools stronger and richer. We actively monitor and tackle all forms of inequality and discrimination. We aim to reflect the full diversity of the communities we serve in our staff and governance.

## CFO Job Description

### Key Information

Post title: Chief Finance Officer

Grade: 13

Responsible to: CEO

Responsible for: Director of Estates and IT Infrastructure, the Trust Finance Team

### Overall Purpose of the Job

As a member of the Trust's Executive Team, the CFO will have overall operational and strategic responsibility for all aspects of the Trust's finances, including financial planning, asset management, payroll, risk management and procurement, and, in conjunction with the Executive Team, ensure the Trust is in a sustainable financial position. The CFO will also oversee the estates and IT function of the Trust, line managing the Trust's Director of Estates and IT Infrastructure and the Trust's Central Finance Team.

The CFO will attend and actively contribute to Trust Board meetings and the Finance, Audit and Risk subcommittee meetings.



## Main Duties and Responsibilities

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### Finance, audit and risk

- Provide strategic guidance, leadership and management of all the Trust's finances, advising the CEO, Trustees and Principals/senior school leaders on all financial matters, ensuring financial propriety
- Advise and support the CEO in the financial aspects of their responsibilities as the Trust's Accounting Officer
- Be responsible for the statutory annual accounts, financial returns and management reports to the Trust Board, the Finance, Audit and Risk Committee and the ESFA/DfE, Companies House, Charities Commission and other statutory bodies, in accordance with guidance and internally and externally determined deadlines
- Be responsible and accountable for the delivery of financial services throughout the Trust, including the management of Trust's accounting system and internal controls
- Ensure the Trust complies with its obligations in accordance with the funding agreement, the Academy Trust Handbook, VAT requirements, accounts direction issued by the ESFA and the Trust's financial regulations and procedures, including the Scheme of Delegation
- Plan and manage change in accordance with the Trust's strategic plan
- Lead on the strategic planning process, deliver annual and medium-term budget plans, periodic forecasts and funding requirements, working closely with the CEO and Principals/senior school leaders to ensure consistency with the Trust's strategic and financial objectives
- Contribute fully to all areas of Trust strategy and provide financial analysis and guidance on all activities, plans and targets
- Continually review, develop and improve the existing financial systems, policies and procedures, ensuring they are streamlined, efficient, robust, compliant and support both current activities and future growth
- Manage the income and expenditure budgets across the Trust, identify any potential financial risks and implement strategies to address issues arising
- Lead on the Trust's approach to audit and risk management in conjunction with the accounting officer and Chair of the Finance, Audit and Risk Committee
- Lead on the audit process and be the main point of contact for the Trust's appointed internal and external auditors, acting as a conduit between Trustees, audit consultant teams and academy/Trust colleagues involved in audit processes and reviews. Review any audit findings and implement changes/improvements to financial processes



### **Procurement and contract management**

- Lead the Trust's procurement strategy and ensure all policies and procedures for buying and ordering supplies and services are robust, fully compliant and operate efficiently, generating economies of scale and value for money and ensuring best value
- Advise on insurance requirements and make appropriate arrangements for insurance cover as required
- Manage the tendering process where required, including taking the lead on negotiations with third parties over the maintenance and development of service level agreements and contracts (e.g. catering, cleaning), and, along with the Executive Team, hold suppliers to account to ensure the provision of high levels of service and value for money

### **Payroll and pensions**

- Have overall responsibility for payroll across the Trust, including checking, reporting, payment, compliance with legislation and other associated payroll responsibilities, e.g. HMRC reporting, tax matters, benefits, etc.
- Be responsible for the management of pensions across the Trust, including ensuring that pension returns (Teachers' Pension Scheme, Local Government Pension Scheme) are completed accurately and on time and liaising with the pension schemes in relation to queries, policies, updates, etc.

### **Capital planning and asset management**

- Manage the process for capital grants and bids where required
- Support the Director of Estates and IT Infrastructure with the estates capital projects and planning process
- Undertake a lead role in supporting the conversion of new schools into the Trust, including overseeing due diligence for all financial and infrastructure aspects and liaising with legal providers where required
- Produce and implement policies and procedures for the procurement, depreciation and disposal of all assets for the Trust

### **Leadership and management**

- Lead and manage the Finance Team and Director of Estates and IT Infrastructure, including all aspects of line management (appraisal, performance management, absence management, etc.)
- Support Business Managers with the finance elements of their role, providing training and advice as and when required
- Attend regular budget monitoring meetings with Business Managers and Principals and provide professional challenge and support regarding expenditure against income
- Actively participate in local and national professional networks and keep abreast of current and best practice

## General Responsibilities

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- Uphold professional standards for the role and follow all school and Trust policies and procedures.
- Comply with Child Safeguarding Procedures and adhere to the Trust's Child Protection and Safeguarding Policy at all times.
- Participate in performance management and take part in appropriate training and development activities.
- Maintain confidentiality in all areas of work and process personal and sensitive information in accordance with relevant legislation.
- Undertake other reasonable duties as requested, in accordance with the changing needs of the organisation.



### QUALIFICATIONS

- Educated to degree level or equivalent
- Professional accountancy qualification e.g. CIMA, ACCA, CIPFA
- Evidence of undertaking continuous professional development

### EXPERIENCE

- A proven track record of successful financial leadership and management and strategic leadership experience, with accountability for a complex and/or multi-site resource base
- Significant experience of leading and managing substantial budgets and working with a range of stakeholders to develop strong financial understanding across the organisation
- Line management experience, including effective delegation, coaching and developing others, and building and leading effective teams
- Experience of developing and managing external relationships with professional and regulatory bodies
- Experience of managing tender processes and negotiating contractual agreements
- Experience of bid writing and/or obtaining additional funding (desirable)
- Experience of working within an educational setting (desirable)

### SKILLS/KNOWLEDGE/ABILITIES

- Well-honed analytical skills, with the ability to interpret complex information, advice and legislation and present this in both written form and verbally to a range of stakeholders
- Ability to challenge and give views and feedback in a constructive manner, in order to effect positive change and outcomes and hold others to account
- Ability to build strong relationships and communicate effectively to a range of stakeholders, including staff, leaders, Trustees, external agencies and others, with a high level of professional credibility
- Excellent proficiency in a range of ICT systems, including standard computer packages (e.g. Microsoft suite, Google) and finance, budgeting and payroll software
- Knowledge of payroll processes and relevant legislation
- Knowledge of charity and/or education sector legislation, funding and accounting policies (desirable)



## PERSONAL ATTRIBUTES

- Strong personal and professional integrity, with resilience and ability to motivate self and others, lead across the Trust and be an excellent role model
- Confidence in dealing with challenging conversations and adhering to policies and procedure
- Excellent personal organisation and a track record of timely delivery of tasks and projects, with a solution-focused approach to problems and competing priorities
- Reflective practitioner with the capacity to challenge and address areas for personal development
- Ability to work both independently and collaboratively
- Commitment to effective and compliant governance and the ability to ensure others adhere to financial policies, procedures and legislation
- Full driving licence and access to a car with business insurance, with the ability to travel to different schools within the Trust and other locations as and when required

## SAFEGUARDING

- Demonstrate a commitment to safeguarding children and ensuring the welfare of children
- Be able to remain calm, empathetic and treat all students with dignity and respect, even when faced with challenging behaviour
- Satisfactory Enhanced DBS check

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## How to Apply

If you are interested in finding our more information and making an application for this role, please contact Rebecca Beach on **07733628155** or email **rbeach@academicis.co.uk**

### KEY DATES

**Deadline for applications:** 28th April 2025

**Shortlisting:** 30th April 2025

**Interview date:** Friday 9th May 2025



**Registered office:** Excel Learning Trust,  
c/o Woodthorpe Primary School,  
Summerfield Road, Woodthorpe,  
York YO24 2RU