



# Coppice

## Primary Partnership

Growing Together, Striving for Excellence.

- Job Title:** Chief Financial and Operations Officer (CFOO)
- Hours/Weeks:** 37hrs per week, 49 weeks per year
- Salary:** Kent Range 11-12 (£43,810 – £58,491 pro rata) dependent on experience
- Responsible to:** Trust Leader/CEO
- Responsible for:** Trust Finance Officer, Trust Senior Finance Assistant, Trust HR Officer, Trust HR Assistant

### **Purpose:**

As a member of the Trust Leadership Group, the CFO works closely with the Trust Leader (who is the Accounting Officer) to provide strategic leadership and management of the operations of the Trust, ensuring best value and enhancing effectiveness in finance and operations leading to improved standards of achievement.

The CFO supports the Board of Trustees, advising on the strategic direction and leadership of all finance and operational aspects of the Trust and its Schools, including budgeting and financial management, HR, estates management and IT.

The CFO ensures the Trust complies with the appropriate legislation and reporting requirements in all financial and operational areas. They ensure the Academy Trust is aware of its obligations under the Master Funding Agreement, Articles of Association and Academy Trust Handbook.

The CFO line manages the Central Finance and HR teams ensuring deadlines are met and support is delivered to the Schools within the Trust as required. This includes overseeing the accuracy of operational duties such as maintaining the Trust budgets, preparing the monthly management accounts and ensuring the accurate payment and management of all staff salaries.

### **Coppice Primary Partnership**

**A:** Loose Primary School, Loose Road, Maidstone. ME15 9UW

**T:** 01622 743549

**E:** [office@coppicepp.org](mailto:office@coppicepp.org)

**W:** [www.coppiceprimarypartnership.kent.sch.uk](http://www.coppiceprimarypartnership.kent.sch.uk)

## **Key Duties and Responsibilities**

### **Strategic Leadership Role**

- Provide clear information, advice and recommendations to the Headteachers, Trust Leader, Local Governing Bodies and Trustees on all financial and operational matters.
- Participate and represent the Trust in national and local networks, so that the Trust is alert to new trends and is familiar with current best practice.
- Undertake line management of staff as required and to participate in Performance Development, including relevant training opportunities for staff development, in line with staffing policies and procedures.
- Promote and market the Trust to a variety of audiences to raise the profile with the local community.

### **Financial Planning, Management and Reporting**

- Prepare the annual budget as part of the three-year financial plan and report to Headteachers, Trust Leader, Local Governing Bodies, Finance and Audit Committee and Trust Board in a timely manner.
- Ensure the working budget is updated for assumptions and changes in a timely manner, reporting as relevant.
- Maintain systems and procedures that ensure financial transactions are recorded and reported accurately. Devise appropriate accounting procedures to ensure the effective operation of financial controls that reduce the risk of fraud and non-compliance.
- Ensure the Trust has a clear and up to date Finance Policy which is underpinned by appropriate processes and procedures for the ordering of goods and services, and processing of payments.
- Develop appropriate financial delegations and work with the central team and Headteachers to ensure compliance with financial procedures and statutory obligations e.g. Academy Trust Handbook, Funding Agreement.
- Identify and drive efficiencies through the use of effective procurement processes.
- Oversees the preparation and consolidation of monthly management accounts ensuring compliance with the Academy Trust Handbook.
- Plan and monitor the cash flow of the Trust; advising on investment opportunities in line with policy to maximise income generation.
- Report regularly on set Key Performance Indicators.
- Be responsible for the annual financial statements, financial returns and reports to Trustees, ESFA/DfE and other statutory bodies in accordance with guidance and externally determined deadlines

- Undertake regular benchmarking comparison exercises and ensure Integrated Curriculum and Financial Planning (ICFP) concepts are embedded at Trust and School level. Report to the Trust Leader on findings, highlighting areas of significant variance.
- Report to the Finance and Audit Committee and the Trustees on all aspects of finance and operations to facilitate effective decision making.

### **Facilities and Estates**

- To create, develop and implement an Estate Management Plan and contribute to the Trust Estate Strategy
- To lead on capital projects, particularly Condition Improvement Fund (CIF) bids, maintain oversight of the tendering, implementation and snagging of all capital works.
- To strategically oversee the safety and security of all schools within the MAT working closely with the head teachers and schools lead for site.
- To monitor, review and devise new systems and procedures to improve efficiency and meet/maintain quality standards
- Complete of all statutory returns relating to estates and facility management in liaison with the Trust Leader.
- Source and be responsible for monitoring the quality and specification compliance of the cleaning, catering and grounds maintenance services to include liaising with the contracted service providers to ensure contractual terms are met.
- Perform due diligence checks and create reports on any potential schools who may join the Trust in the future.

### **Health and Safety**

- To maintain oversight of Health & Safety across the Trust Estates,
- To carry out an annual review to determine that the Trust properly discharges its duties under its own health & safety policy; the health & safety at work act; COSHH regulations;
- To develop, implement and communicate policies, procedures and processes concerning Health and Safety (including risk/emergency management).
- To actively monitor developments and changes in legislation in respect of Health and Safety requirements and advise on appropriate action as required.

### **IT**

- Develop and implement the Trust's IT strategy, aligning technology initiatives with educational goals and operational efficiency.

- Oversee the maintenance and development of the Trust's IT infrastructure, ensuring reliable and secure systems across all academies.
- Implement robust cybersecurity measures to protect data and systems, ensuring compliance with relevant regulations.
- Lead IT projects from conception to completion, ensuring timely delivery within budget constraints.
- Establish and enforce IT policies and procedures, promoting best practices and compliance across the Trust.

### **Internal and External Audits**

- Advise Trustees and the Trust Leader on external and internal audit arrangements as required by financial regulations and funding bodies.
- Manage the process of Internal Scrutiny, ensuring any recommendations made are implemented in a timely manner.
- Manage the External Annual Audit process, ensuring filing deadlines are met.
- Ensure the audit and submission of the Teachers' Pension End of Year Certificate by the relevant deadlines.

### **Payroll and HR**

- Ensure that the Trust Payroll is delivered efficiently and effectively and where organised via an external provider, it provides value for money and the service received at least meets expectations and performance targets, with statutory returns being accurate and submitted on time.
- Ensure that staff are paid accurately and timely each month.
- Ensure that personnel matters relating to salary, pension and HM Revenue and Customs queries are dealt with efficiently and in the appropriate timescales.
- Liaise with the Trust HR team to ensure accurate and timely sharing of information across the Trust as necessary

### **Income Generation**

- Liaise with funding agencies to secure additional funding for the Trust.
- Identify potential funding opportunities, agencies, Government initiatives etc. and ensure income generation from both diverse and obvious sources.
- Work with all Senior Leaders to maximise income generation and financial growth
- Research and complete funding bids to external bodies including Government departments. Adhere to strict deadlines and monitor the funding to ensure that any funds received from successful bids are spent appropriately and within time scales.

## Management of Staff

- Ensure staff are efficient and effective.
- Provide leadership, motivation, support and control of staff allocated to areas of responsibility, ensuring that appropriate standards of behaviour, performance and customer care are demonstrated at all times.
- Actively contribute to the development of quality improvement programmes across the Trust.

## Other

- Attend Trustee and Finance and Audit Committee meetings; preparing papers as required that report on relevant aspects of finance and operations, such as management accounts, budgets, HR and payroll, estates strategy, IT strategy and Health and Safety reports
- Provide training and development to all staff and Trustees in relation to financial matters.

In addition, the post holder will undertake any other miscellaneous work, deemed suitable by the leadership of the trust.

**We are committed to equality throughout our organisation. We are also committed to safeguarding and promoting the welfare of children and expect all staff and volunteers to share this commitment.**

Post holder: .....

Signed: .....

Date: .....

## Person Specification

### Essential Criteria

#### 1. Qualifications and Professional Experience

- A relevant accounting qualification (e.g., ACA, ACCA, CIMA or equivalent) is essential.
- Proven track record in a senior finance role within the education sector or a multi academy trust environment.
- Demonstrated experience in preparing annual budgets, multi-year financial plans, cash flow management, and the consolidation of management accounts.
- Experience in managing internal and external audit processes, ensuring robust financial controls and compliance with statutory obligations (e.g., Academy Trust Handbook, funding agreements).

#### 2. Strategic and Operational Leadership

- Ability to provide clear, concise advice and recommendations on financial and operational matters to senior leaders and trustees.
- Experience in line managing finance, HR, or operational teams, including staff development, performance management, and fostering a culture of continuous improvement.
- Proven capability in representing an organisation at external networks, maintaining strong relationships with funding bodies, and engaging with the local community.

#### 3. Technical and Operational Expertise

- Strong ability to develop, implement, and monitor financial systems, internal controls, and procurement processes to mitigate risks and ensure transparency.
- Experience in overseeing key operational areas including estates management, payroll, HR functions, IT strategy, and health and safety practices.
- Demonstrable experience in identifying and securing additional funding sources and managing capital projects.

#### 4. Communication and Interpersonal Skills

- Excellent verbal and written communication skills with the ability to present complex financial data clearly to diverse audiences.
- Strong negotiation and relationship-building skills, with the ability to collaborate effectively with internal teams, senior management, and external stakeholders.

## **5. Personal Attributes and Commitment**

- A forward-thinking approach with a commitment to driving efficiency, cost-effectiveness, and quality improvements across the Trust.
- High levels of personal integrity and a strong commitment to safeguarding and promoting the welfare of children.
- Resilience and flexibility to adapt to the dynamic educational landscape

### **Desirable Criteria**

- Experience working within a multi academy trust or the broader education sector.
- Previous involvement in the oversight of IT infrastructure, estates and facilities management, and the development of health and safety policies.
- Experience in marketing or promoting the organisation to raise its profile within the local community.
- Proven success in managing funding bids and securing external financial support.