

Recruitment Pack: Chief Financial Officer

Mersey View Learning Trust



A WELCOME FROM THE CHAIR OF TRUSTEES



Dear candidate

I am delighted that you have expressed an interest in the post of Chief Financial Officer at Mersey View Learning Trust and hope that after considering all the information you will make an application.

Mersey View Learning Trust was incorporated in 2024 and we are six academies who teach and care for over 3000 learners in Merseyside. All the academies are equal collaborators in school improvement and raising aspirations in young people to achieve great things academically and personally. Our collaboration of academies was borne out of our shared desire to create outstanding provision for all learners within our communities. Our vision and values focus on inclusion, aspiration and care for all our learners and staff.

As a newly established trust, we are looking to appoint a highly motivated and experienced Chief Financial Officer to join our leadership team. This individual will play a key role in shaping and driving the financial strategy of the Trust, ensuring the financial health and sustainability of the organisation as we continue to expand. The CFO will be responsible for overseeing the financial operations of the Trust, including budgeting, financial planning, forecasting, and reporting. As a senior leader, the CFO will work collaboratively with the CEO and Board of Trustees to ensure that the Trust's resources are being used efficiently to support our educational vision. You will play a vital role in developing robust financial processes, ensuring compliance, and providing strategic advice to support decision-making across the Trust. Our focus on enrichment and wellbeing is central to the educational experience we provide. The CFO will help ensure that our resources are aligned to support this vision, enabling the delivery of a broad and inclusive curriculum that supports every pupil in achieving their best. Inclusion and equity are core to everything we do, and we are committed to ensuring that every child has the resources and opportunities they need to thrive.

The Chief Financial Officer will need to build strong relationships with the Trust's senior leaders and central team, as well as establish effective partnerships with external bodies and the Trust Board. The successful candidate will be passionate about ensuring the financial sustainability of our Trust while supporting our mission to help every pupil achieve their potential. You will be expected to uphold the highest standards of financial integrity and accountability, ensuring that safeguarding is central to the financial systems, processes, and strategies we implement across the Trust. We are looking for an individual who resonates with our vision and values, someone who is committed to leading us in a way that enhances both educational and financial outcomes for all our learners.

I hope you are excited by the prospect of this post. If you require further information or have any questions about the role please contact HR@merseyview.com

Wishing you every success with your application.

Kind regards



Jan Vicary
Chair of Trustees

Application Process

To submit an application in full, please follow the attached link to the Mersey View Learning Trust website <https://www.merseyview.com/Vacancies/> Candidates will be required to create a profile, complete the relevant application questions and submit the same.

Closing date for applications: **Friday, 7th March 2025 at 9am.**

Application Guidelines

- Your application letter should be structured around the key requirements of the role as set out in the application pack, providing relevant examples from your career to date which demonstrate why you are a suitable candidate for this role.
- This should be no more than 2,000 words to be submitted in the 'reasons for applying for the role section' which addresses the person specification requirements.
- All fields must be completed as part of the standard application format
- Please ensure that a minimum of two referees are included in your application, your referees will be contacted on the basis that you have been shortlisted and invited to an interview.

Mersey View Learning Trust is committed to safeguarding and promoting the welfare of its pupils and expects all those working at the school to share this commitment.

The Trust is required under law and guidance to check the criminal background of all employees. Decisions to appoint will be subject to consideration of an Enhanced Disclosure, including a Barred List check from the Disclosure and Barring Service. Because of the nature of the work for which you are applying, this post is exempt from the Rehabilitation of Offenders Act 1974 (Exceptions) Order 1975 (as amended in 2013 and 2020).

The amendments to the Rehabilitation of Offenders Act 1974 (Exceptions) Order 1975 (2013 and 2020) provides that when applying for certain jobs and activities, certain convictions and cautions are considered 'protected'. This means that they do not need to be disclosed to employers, and if they are disclosed, employers cannot take them into account. Guidance on whether a conviction or caution should be disclosed can be found on the Ministry of Justice website which can be accessed here:

<https://www.gov.uk/government/publications/new-guidance-on-the-rehabilitation-of-offenders-act-1974>

Successful applicants will be required to complete a confidential medical questionnaire and may be required to undergo a medical examination.

The Trust may carry out an online search on shortlisted candidates as part of our due diligence and in line with Keeping Children Safe in Education. This may help identify any incidents or issues that have happened and are publicly available online, which we may wish to explore with you at interview.

Job Description

Job title	Chief Financial Officer
Responsible to	Chief Executive Officer
Hours of work	Full Time, Permanent
Salary	£75,000
Base	Chesterfield High School but may be asked to work at any location

Main duties and responsibilities

1. Role outline
1.1. The CFO is responsible for the financial development and sustainability of the Trust and for the financial probity of the organisation.
1.2. They will be responsible for providing the leadership and management of the trust's finance and business functions, enabling the trust to work effectively towards its aims.
1.3. They will support the CEO in their role as the trust's accounting officer.
2. General
2.1. Ensure the financial sustainability of the multi-academy trust (MAT).
2.2. Comply with all of the MAT's policies and procedures, ensuring confidentiality is maintained where appropriate.
2.3. Maintain a secure overview of the management of all financial issues within each of the MAT's academies, providing financial assistance to the principals of each academy, the chief executive officer (CEO) and board of the MAT.
2.4. Keep the CEO and the board up-to-date with the latest funding changes, company law and other statutory guidance.
2.5. Ensure the MAT acts in compliance with relevant legislation and guidance at all times.
2.6. Uphold good governance and ethical behaviour, including good accounting practices and internal control systems.
2.7. Ensure that the MAT's resources are managed efficiently, ethically and professionally.
2.8. Analyse and interpret financial reports, communicating findings in a simplified manner when necessary.
2.9. Cooperate with, initiate and manage audit procedures.
2.10. Attend relevant committee meetings as required to maintain the presence of the finance function.
2.11. Implement appropriate safeguarding protocols and control measures.
2.12. Liaise with external regulators such as the Education Funding Agency (EFA) and Charity Commission.

2.13. Act as the leading point of reference for financial and commercial issues.
2.14. Contribute to the ethos, development and success of the MAT.
2.15. Manage the central accounting role, ensuring that efficient income and payroll controls are in place and adhered to.
2.16. Develop close and effective working relationships with key partners and stakeholders.
3. Operational and strategic
3.1. Analyse and interpret data in relation to the MAT; developing solutions and strategies over the medium and long term.
3.2. Advise the CEO and the board on all matters relating to the financial strategy.
3.3. Maintain effective systems of internal audit and control.
3.4. Develop and implement strategies for maximising the MAT's current finances.
3.5. Prepare the MAT's annual and quarterly financial forecasts.
3.6. Work alongside the CEO and senior leadership team in developing and maintaining a strategic financial plan, including a five-year budget plan.
3.7. Develop and maintain an in-house finance manual that sets out the MAT's operational financial procedures.
3.8. Support or lead financial risk assessments.
3.9. Develop and evaluate an in-house payroll service.
3.10. Establish and maintain a risk register for the MAT to record risks and opportunities as they arise.
3.11. Develop and implement financial policies and procedures across the MAT in order to streamline functions and ensure efficiency.
3.12. Manage all financial aspects of major capital projects.
3.13. Participate in the financial management of the MAT's major projects, as required by the CEO.
3.14. Participate in appraisal arrangements, and undertake training and CPD where appropriate.
4. Budgetary control
4.1. Oversee the preparations of an annual budget plan for each academy within the MAT before the start of each financial year.
4.2. Monitor expenditure and report to the CEO regarding income and cash flow against the approved budget.
4.3. Submit reports on each academy's financial position to each meeting of the finance committee.

4.4.	Assist each academy's principal in setting and managing their academy's budget.
4.5.	Approve monetary transactions within the delegated financial limits for the MAT's core operations and report such approvals to the finance committee.
4.6.	Review any monetary transactions required for an academy's budget and recommend these to the CEO and board of directors for approval if appropriate.
4.7.	Review the quarterly, monthly and ad-hoc management accounts prepared by the school business manager.
4.8.	Compare payroll costs each month to the budgeted costs and produce comparative reports for the CEO.
4.9.	Produce termly internal audit reports which are shared and explained to the CEO, finance committee and principals.
4.10.	Advise the CEO and the board if fraudulent activities are suspected or uncovered.
5.	Procurement and purchasing
5.1.	Maintain an overview of all the academies within the MAT, providing best value options for key purchases.
5.2.	Oversee tenders for service contracts, evaluating cost effectiveness and value for money.
5.3.	Provide advice to the trust's school business managers and the CEO over retention of quotes obtained for goods and services.
5.4.	Prepare financial appraisals of new projects.
5.5.	Ensure that an ethical purchasing system is in place to guarantee value for money is obtained and best use made of resources.
5.6.	Maintain the MAT's financial risk register.
6.	Organisational
6.1.	Ensure that academy-based finance staff receive timely, succinct and clear guidance to ensure that they are effective and efficient in the discharge of their duties.
6.2.	Ensure all forms and returns required by the EFA are prepared and submitted in the specified format and filed before the deadline.
6.3.	Write the annual report and prepare the consolidated financial statements in the specified format for auditing by external auditors.
6.4.	Liaise with the finance committee, accountants and auditors where appropriate.
6.5.	Prepare appropriate bids or tender documents to acquire identified additional funds or grants.
6.6.	Ensure the monthly payroll is checked and certified by each academy's principal.
6.7.	Report to the DfE and other relevant bodies in line with their specific requirements.
6.8.	Maintain records to an appropriate standard in order to meet legal and tax requirements.

6.9.	Ensure appropriate insurance cover is in place and arrangements are regularly reviewed and monitored.
6.10.	Promote financial awareness throughout the MAT.
6.11.	Identify and implement opportunities for collaborative working across the whole financial function of the MAT.
7. Leadership and people development	
7.1.	Drive a culture of high expectations, supporting school leadership teams to improve standards across all departments and areas.
7.2.	Ensure that the Headteachers and other school leaders are supported through significant transformational change projects.
7.3.	Ensure leaders across the Trust receive the appropriate teaching and leadership training and continue to develop their practice
7.4.	Work with Headteachers to recruit staff of the highest quality across the group individual schools.
7.5.	Promote a positive culture throughout the organisation and adopts behaviours that exemplify the Trust's values.
7.6.	Line manage and performance develop designated members of the Finance Team/senior leadership in individual academies, setting ambitions and encouraging continuing professional development
7.7.	Build own leadership capacity and takes responsibility for own professional development by actively engaging with and seeking out areas for improvement.
7.8.	Work alongside the Chief Executive to ensure high quality development of delivery of high quality CPD programme for finance colleagues, annual Trust Conference and the Trust's Ethical Leadership Framework.
8. Influencing and managing relationships	
8.1.	Nurture robust, open and effective relationships with all parties across the Trust and with key external agencies and stakeholders including, Sefton Local Authority, the Regional Schools Commissioner and other Trusts.
8.2.	Foster a culture of collaboration by creating networks and opportunities for schools and individuals within the group to engage each other and to build effective extended learning communities.
8.3.	Facilitate the partnership and networking of Headteachers, School Leaders and Trust staff to share and promote best practice and to support each other with challenges.
8.4.	Create effective working relationships with the senior leadership team of each school within their group.
8.5.	Works closely with all Trust schools.
9. Safeguarding	
9.1.	To be aware of and work in accordance with the Trust's child protection policies and procedures in order to safeguard and promote the welfare of children and young people and to raise any concerns relating to such procedures which may be noted during the course of duty.
10. Other duties	

10.1. To play a full part in the life of the school community, to support its mission and ethos and to encourage staff and students to follow this example.
10.2. To actively promote the school and Trust's policies.
10.3. To be courteous and provide a welcoming environment.

Person specification

	Essential	Desirable
Qualifications and training	<p>The successful candidate will:</p> <ul style="list-style-type: none"> • Hold a degree or equivalent qualification in a finance related discipline. 	<ul style="list-style-type: none"> • Be a qualified accountant.
Experience	<p>The successful candidate will have experience of:</p> <ul style="list-style-type: none"> • Working at a senior level with financial management systems. • Leading and managing budgets. • Designing and implementing financial management processes and controls. • Managing procurement and contracts. • Generating income and preparing bids. • Managing and working in a large and complex organisation which operates across multiple sites. 	<ul style="list-style-type: none"> • Experience of working in an educational setting. • Experience of obtaining additional funding. • Experience of working with external auditors and agencies.
Knowledge and skills	<p>The successful candidate will have:</p> <ul style="list-style-type: none"> • Up-to-date knowledge of accountancy and professional codes of practice. • Advanced knowledge of statutory requirements and funding strategies regarding the education sector. • Proven awareness and respect for the highly sensitive status of information and its confidentiality. • The confidence to challenge opposing views by presenting robust arguments and reasons for the contrary view. • Excellent written and verbal communication skills. <p>The successful candidate will be able to:</p> <ul style="list-style-type: none"> • Interpret complex financial information and statute, and devise policies and procedures in light of these. • Work as part of a team as well as work independently. • Work effectively with colleagues, governors and parents. • Manage projects and lead a group. • Efficiently collate and analyse data. • Effectively demonstrate a high level of computer skills. 	<ul style="list-style-type: none"> • An ability to motivate colleagues. • An ability to identify commercial opportunities to maximise income.

Knowledge and skills	<ul style="list-style-type: none"> • Work collaboratively with a 'hands on' approach to lead the introduction of new financial systems and processes across the MAT's schools including advising on, developing, introducing and training for new systems. 	
Personal qualities	<ul style="list-style-type: none"> • Genuine passion for and a belief in the potential of every student, whatever their background or personal characteristics, and a clear understanding that all roles in the school, including support roles, are focused on student achievement. • A robust awareness of keeping children safe, noticing safeguarding and welfare concerns, and a clear understanding of how and when to take appropriate action • High levels of honesty and integrity, with an unbending commitment to Equality, Diversity and Inclusion. • Effective leadership and management style that encourages participation, innovation and develops colleagues' confidence and trust. • The ability to work in close harmony with the CEO, Executive Team and other senior leaders • The ability to develop the leadership skills of others as well as to learn from others. • The ability to enthuse and inspire others. • Excellent listening skills. • Passion, energy, resilience, and optimism to lead the school through day-to-day challenges while maintaining a clear strategic vision and direction. • The ability to develop positive relationships with all young people and adults and a firm and constant belief in the unlimited potential of every student (particularly disadvantaged students, those from ethnic minority backgrounds and those with additional needs) and a genuine commitment to inclusive educational provision. • The ability to take personal responsibility, a readiness to reflect and self-evaluate and the ability to be flexible, to change, improve and develop • Confidence and self-motivation, and the ability to be decisive 	

	<ul style="list-style-type: none"> • A professional outlook, willingness to ‘sweat the small stuff’, and an ability to manage multiple simultaneous priorities and meet deadlines • A team player who can work collaboratively, as well as use their own initiative • Calm and professional under pressure • Understanding of the importance of confidentiality and discretion • Flexible attitude towards work and sound judgement. 	
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The above qualities will be assessed through a comprehensive recruitment process, which involves application analysis, scrutiny of reference and interview.

The post holder will be required to complete an enhanced Disclosure Barring Service (DBS) Check with appropriate barred list checks, or the equivalent and must be eligible to work in the UK.