



Chief Finance and Operations Officer Candidate Pack

Welcome Letter



Dear Applicant,

Thank you for your interest in this important new role of **Chief Finance & Operations Officer** at *Engage Enrich Excel Academies (EEEE)*. I hope the contents of this recruitment pack provide a helpful insight into who we are as a Trust and enable you to decide whether you have the qualities, values and skills to apply for this position.

Our vision is to inspire belonging through respectful collaboration, empowering all to achieve excellence.

Since our founding in 2014, EEEA has grown as a primary-focused Trust rooted in local communities, and by September 2025 we will be a family of eight schools. We are committed to unlocking potential and growing stronger together, not just for pupils, but for staff, families and communities alike.

We believe that education is about more than academic success—it is about shaping confident, compassionate and curious individuals. Our schools provide environments where pupils feel safe, respected and empowered to thrive. This same ethos extends to our teams; we know that by valuing our people and encouraging collaboration, we can make a real difference.

This is a pivotal time in our journey. With two new schools opening, strong Ofsted outcomes across the Trust, and a commitment to excellence in all we do, the appointment of a **Chief Finance & Operations Officer** is critical to our future success. You will work closely with me to deliver a long-term sustainable strategy, lead a high-performing team, and ensure that our operations, finances, and systems support the very best outcomes for children. Our central team works collaboratively with our Board of Trustees and Headteachers, creating a culture of trust, transparency and collective responsibility that strengthens leadership at every level.

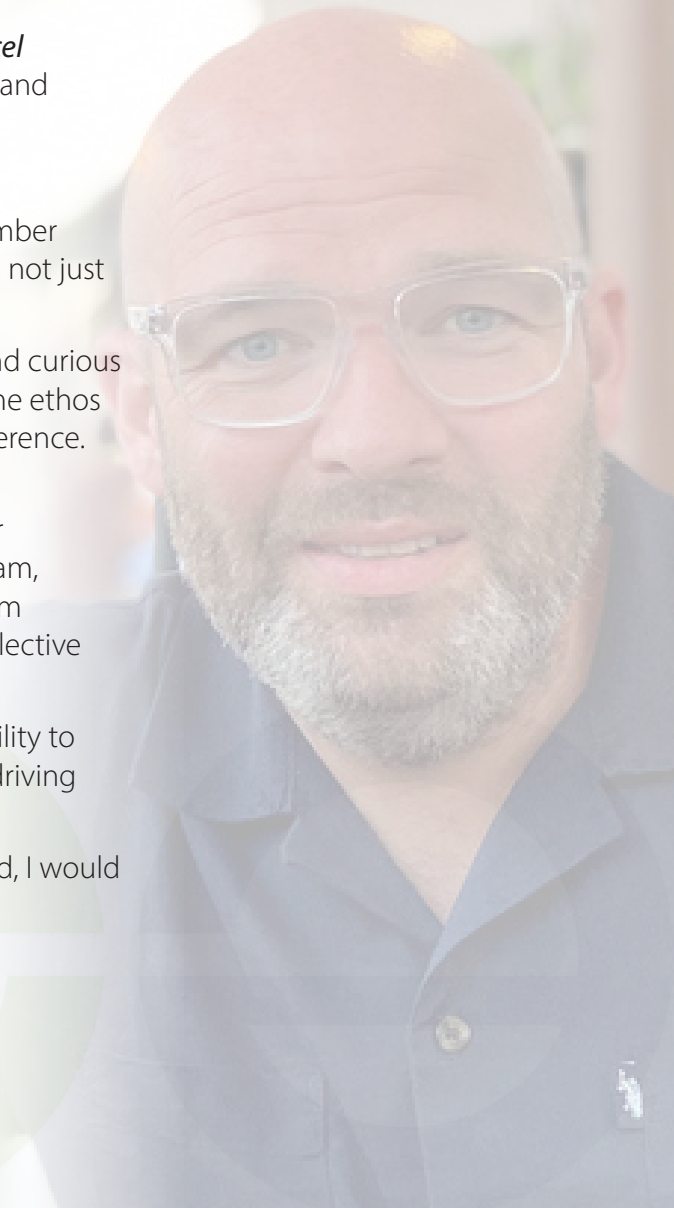
We are seeking a strategic thinker, someone who brings deep financial expertise, operational excellence and an ability to lead with integrity and purpose. You will have the chance to shape the future of our Trust and to play a key role in driving forward our next chapter.

If you share our values of belonging, respect, and empowerment, and if you believe in education as a force for good, I would be delighted to hear from you.

Warmest regards,

David Harris

Chief Executive Officer
Engage Enrich Excel Academies



About Engage Enrich Excel Academies



At Engage Enrich Excel Academies (EEEE), our vision is simple and powerful:

Inspire belonging through respectful collaboration, empowering all to achieve excellence.

We are a Trust of eight primary schools, serving over **2,500** pupils and employing more than **300** dedicated staff. We are proud to shape vibrant, inclusive learning communities. From opening **The Cambridge Primary School**, growing that school and its community from day one, to preparing the launch of two new, purpose-built schools (**Stanhope Primary and Hounsborne Fields Primary**), we are passionate about creating schools that sit at the heart of the communities they serve. Helping to build these from the ground up is both exciting and rewarding.

Our core purpose is teaching and learning, and we believe we have a moral obligation to foster the hopes and dreams of every child and adult within our Trust. Every school has a key role to play, and we support leaders to focus relentlessly on high-quality pedagogy and innovation to drive pupil progress.

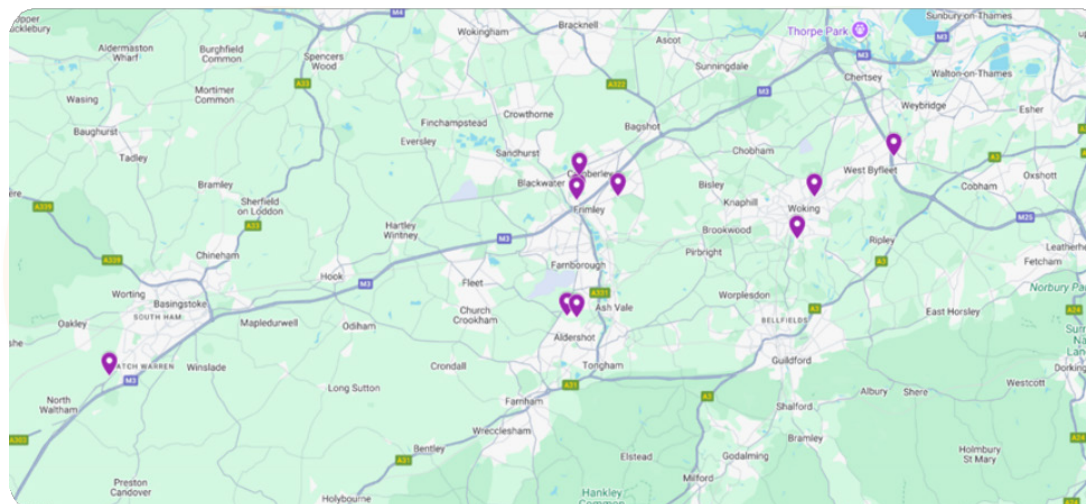
We believe our vision is best achieved by:

- Nurturing a culture of trust, collaboration and collective responsibility
- Developing outstanding leadership at all levels through positivity and shared purpose
- Enabling each school to build an inspirational, community-rooted curriculum
- Committing strongly to improving the life chances of vulnerable children

Our values; *Belong, Respect, Empower*, shape everything we do. They help us build individuals and communities who have the courage to stand for what is right and challenge what is not.

EEEE is proud to work with like-minded professionals who are ambitious, reflective and committed to continual improvement in the communities we serve.

EEEE School Locations:



Job Description



Job Title:	Chief Finance and Operations Officer (CFOO)
Location:	181 Frimley Road, South Camberley Primary & Nursery School Junior Site, GU15 2QB Hybrid working at EEEA central office, EEEA schools and home. Can be fully home based during school holidays.
Hours:	Full time 36 hours a week, permanent, full year.
Reports to:	Chief Executive Officer (CEO)
Staff Responsible for:	HR Manager, Finance Manager, Trust Business Managers
Salary Range:	£70,000 to £80,000 depending on experience
Closing Date:	Monday 15th September 2025 at Noon
Job Purpose:	<p>Chief Finance & Operations Officer will be a member of the Trust Executive Team, with a key role in the long-term strategic development and planning for the whole Trust. You will work closely with the CEO and have responsibility for all financial and operational matters affecting the Trust.</p> <p>As an integral part of the Executive Team at EEEA, you will:</p> <ul style="list-style-type: none">• Lead on strategic, financial and operational issues of all aspects of the Trust.• Ensure that the financial and operational systems, processes, and functions are compliant, efficient, reliable, and quality assured through effective policies and internal controls.• Manage the governance framework of the Trust, working with the CEO and Trust Board to provide professional support and development, promoting high expectations for all involved in business and finance within the Trust.• Provide the CEO and Trustees with up to date advice on statutory requirements and accountability frameworks, ensuring that these are communicated in a timely manner.• Produce clear, concise, professionally researched policies, plans and reports.• Monitor business and financial performance against expectations and external benchmarks through systematic quality assurance, self-evaluation and planning.

Job Description continued



Key Objectives and Accountabilities

Leadership & Strategy

Establish, lead and be responsible for implementing:

- A sustainable business strategy and long-term financial plan to facilitate Trust growth and delivery of the Trust Strategic Development Plan.
- A strategy and supporting structure for key support services (IT, HR, Facilities & Finance) which provides an effective level of provision in an efficient manner.
- Cost-efficient plans to deliver agreed objectives and targets.

Influence the Trust's strategic decision making to ensure best value.

Finance

- Ensure that the Trust is compliant with the Academies Financial Handbook and other external and internal governance frameworks.
- Advise the CEO and Board on investment and financial policy, preparing appraisals for projects and the Trust Business Plan for the future development of the Trust.
- Develop networks of commercial activity which enhance the Trust's budget and the reputation of the Trust.
- Lead on the financial aspects of the Trust Development Plan, reflecting on current trends and internal and external influences.
- Lead on external audit and related processes.
- Lead on CIF bids and other grant opportunities.
- Ensure robust controls and monitoring systems are in place throughout the Trust.
- Report to Finance, Audit and Risk Committee and the Trust Board on all aspects of Trust finance and business operations to facilitate effective decision making.



- Manage the financial aspects of the Strategic Development Plan providing material reforecasts to reflect dynamic changes in the internal and external environment.
- Ensure any financial issues identified are swiftly resolved.
- Have oversight of the production and submission of all external returns including the annual report, ensuring their accurate and timely submission to external stakeholders and funding agents.
- Commission and procure services on behalf of the Trust as required, in accordance with the Trust Procurement Policy. Monitor the effectiveness and implementation of these agreements.
- Seek and make use of specialist financial expertise, maximising income opportunities wherever possible, through commercial activity such as investment, use of facilities, preparing and submitting bids, sponsorship and generating income through other business opportunities.
- Ensure the safety, security, and effective maintenance of the Trust's assets.

Job Description continued



Estates - Facility Management

- Lead and co-ordinate the estate management and development strategy and capital plan, liaising with the Executive Team, developing the sites to meet the aims of the schools.
- Liaise with the DfE/ESFA or other providers of financial support, together with the Trust professional advisors, on all matters relating to capital building and development projects.
- Appraise development projects to ensure their delivery within scope, timescales and on budget.
- Proactively seek opportunities to secure capital funding for the development of the Trust.
- Ensure that the Trust maintains high standards of security for all school sites to safeguard our children, staff and visitors.
- Ensure procurement arrangements represent best value and that contracts are secured in accordance with financial guidelines and regulations.
- Develop and promote energy efficiency measures across the Trust.
- Liaise with service providers for contracted out provisions to ensure compliance with contractual terms and their effective operation.
- Lead on the Trust Transport Strategy, ensuring that staff and students are traveling in the safest and most economical way.

Health & Safety

- Secure and provide appropriate advice for the Trust Board, Head Teachers and Executive Team on all Health & Safety matters.
- Secure effective arrangements for the monitoring and audit of Health and Safety matters.



- Ensure the compliance with the requirements of the Health & Safety at Work regulations: to take reasonable care of the Health & Safety of all employees and to ensure that the Health & Safety responsibilities are carried out.
- Be responsible for all policies and procedures relating to health and safety (including First Aid, Fire Safety, Asbestos Management and other related policies) and ensure that staff are sufficiently trained in all aspects.
- Ensure that accident reporting is embedded in the culture of the Trust, including the reporting of near misses and that effective investigation and 'lessons learnt' procedures are in place.

Job Description continued



Risk Management

- Lead on the Trust's Risk Management Strategy, including the updating and communication of the Trust and Academy Risk Registers.
- Ensure all risks that are at variance with the Trust's risk appetite are immediately escalated through the governance framework.
- Lead on the Business Continuity and Emergency Planning Procedures across the Trust.
- Manage ICT Services, Cyber risk, Data Protection and RPA Insurance.
- Lead on the Trust's ICT Strategy alongside the Executive Team and the IT Service Provider.
- Manage the performance of the ICT Managed Service Contract in relation to agreed KPIs and other performance criteria.
- Ensure that the Trust remains GDPR compliant, working closely with the Trust's Data Protection Provider.

Human Resources

- In conjunction with the HR Manager, lead the development of the Human Resource management function across the Trust, taking due note of all legalities that pertain.
- Ensure that staff and Trustees have a clear understanding of policies and procedures and the importance of putting them into practice.
- With the Executive Team, evaluate the Trust's strategic objectives and offer advice on workforce planning and commercial opportunities.
- Ensure the externally provided payroll services for all Trust staff are monitored, ensuring pension and HMRC requirements are met.



Governance

- Work with the Members, Trust Board, local advisory boards and the CEO on statutory, constitutional, policy and process requirements and, when necessary, taking independent legal advice and input from third parties in considering and communicating the implications of any developments in national or trust policy.
- Attend Board and relevant committee meetings external events as required.
- Ensure the Trust and constituent school websites are compliant and up to date.

Job Description continued



Academy Conversions

- Act as internal project lead on all academy conversions, including free schools, ensuring effective due diligence on all estate and compliance issues.

Marketing

- In conjunction with the Trust's marketing partner, lead on the promotion of the Trust to different audiences, raising its profile within the local community and at regional and national levels.

Other Duties

- Develop constructive relationships and communicate with other agencies/professionals.
- Engage with other Trusts, networks and forums so that the Trust is familiar with current thinking and best practice.
- Attend and participate in regular meetings sharing experience and skills with others.
- Support/assist the Trust's individuals with financial responsibility who are based at each of the Trust's settings.
- Provide training to staff on new systems and procedures and keep appropriate records.
- Any other duties commensurate with the role.

General

- Be aware of and support difference and ensure equal opportunities for all.
- Contribute to the overall ethos/work/aims of the Trust.
- Attend meetings within the Trust, at its academies and external events as required.
- Share expertise and skills with others.
- Participate in training and other learning activities (CPD) and performance development as required.



- Work effectively and professionally with all stakeholders, promoting the Trust positively at all times.
- Recognise own strengths and areas of expertise and use these to advise and support colleagues.
- Maintain confidentiality always in respect of school-related matters and to prevent disclosure of confidential and sensitive information.
- Ensure strict confidentiality in all areas of work.
- All employees are required to uphold the values of democracy, rule of law, individual liberty and tolerance and have mutual respect for those with different faiths and beliefs (Prevent).
- Work and process personal and sensitive information in accordance with Data Protection Act 2018 including the General Data Protection Regulations (GDPR) 2018.
- Understand and comply with the statutory guidance regarding safeguarding of children, ensuring the safeguarding and promotion of children's welfare at all.

Person Specification



Key for assessments: A = Application form, I = Interview, R = References, T = Task

AREA	ESSENTIAL	DESIRABLE	HOW ASSESSED
Qualifications			
A recognised professional chartered accountancy qualification e.g. ICAEW, ACCA, CIPFA, CIMA		•	A
A recognised professional chartered accountancy qualification e.g. ICAEW, ACCA, CIPFA, CIMA with 2 years post qualification experience, or AAT Level 4 with 5 years post qualification experience		•	A
Degree of equivalent related professional qualification	•		A
Experience, Skills and Knowledge			
A strong and proven track record of working at a senior level in a leadership role	•		A/I/R
Exceptional analytical and problem-solving skills	•		A/I/R
Ability to present ideas and strategies to, and write reports for, a variety of audiences including Trustees and external agencies	•		A/I/R
Broad experience of project management with a proven track record of leading and delivering organisational change and value for money	•		A/I/R
Experience of leading successful teams, setting targets for performance, delegating tasks appropriately and monitoring the quality of delivery and outcomes	•		A/I/T/R
Able to strategically influence financial planning and decision making within an organisation	•		A/I/R
Understanding of company and charity finances including governance, accounting and reporting requirements, and procurement	•		A/I/R
Understanding of key elements of an effective human resources and performance management function including processes, policies, systems and structures	•		A/I/T/R
Clear understanding of how an effective IT strategy, infrastructure, systems and processes underpin a successful organisation	•		A/I/R
Understanding of estates and facilities management, ideally across multiple sites, to include compliance and health and safety requirements	•		A/I

Person Specification continued



Key for assessments: A = Application form, I = Interview, R = References, T = Task

AREA	ESSENTIAL	DESIRABLE	HOW ASSESSED
Experience, Skills and Knowledge <i>continued</i>			
Strong understanding of strategic risk management including risk registers, internal audit and cyber risk	●		A/I
Strong IT skills	●		A/T
Experience of working in the education sector, ideally a MAT	●		A/I/R
An understanding of the educational agenda including current national policies and the statutory and legal framework governing multi-academy Trusts		●	A/I/R
Personal Qualities			
Proactive, self-motivated and determined	●		A/I/R
Highly developed interpersonal and communication skills and the ability to influence and build relationships	●		A/I/R
Willingness to constructively challenge the work of self and others to continually improve own and team performance	●		A/I/R
Ability to balance strategy with operations and to respond to changing priorities and demands	●		A/I/R
Ability to work under pressure and meet deadlines and ensure completion of projects and tasks	●		A/I/T/R
Other			
Commitment to safeguarding and promoting the welfare of children and young people	●		A/I/R
Willingness to undergo appropriate checks, including enhanced DBS checks	●		A/I/R
Motivation to work with children and young people	●		A/I/R
Ability to form and maintain appropriate relationships and personal boundaries with children and young people	●		A/I/R



Safeguarding Statement

Engage Enrich Excel Academies (EEEE) is committed to safeguarding and promoting the welfare of children and young people. Applicants must be willing to undergo child protection screening appropriate to the post, including an Enhanced DBS check (including the Children's Barred List) and satisfactory employment references.

Applicants are required, before appointment, to disclose any conviction, caution or binding over, including 'spent convictions' under the Rehabilitation of Offenders Act 1974 (Exemptions) Order 1975.

Equality and Diversity Statement

EEEE treats all applicants for employment equally, regardless of age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex or sexual orientation. We are committed to building a diverse and inclusive workforce.

Disability Statement

EEEE is committed to promoting equality of opportunity for people with disabilities. We continuously review our policies and practices to ensure that individuals with disabilities receive fair and full consideration during recruitment and employment. Applicants will be assessed solely on their ability to do the job. Where needed, reasonable adjustments will be made. During employment, EEEA will, wherever possible, retain the services of employees who become disabled.

GDPR

A copy of our Privacy Notice is available via our website.
www.eeea.co.uk



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** or by phone on **07818 875514 / 01223 907979**.

CLOSING DATE:

Monday 15th September 2025 at Noon

SHORTLISTING:

Monday 15th September 2025

INTERVIEWS:

Friday 19th September 2025



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Camberley,
Hampshire,
GU15 2QB