THE Pinnacle LEARNING TRUST



The Pinnacle Learning Trust

Chief Finance and Operations Officer

Recruitment Pack



CEO's Introduction

Thank you for your interest in joining The Pinnacle Learning Trust as our Chief Finance and Operations Officer (CFOO).

Financial and operational decisions are, at their core, educational decisions. They determine what we can sustain, where we can invest, and how confidently we can plan for the future. At The Pinnacle Learning Trust, our vision is to transform the lives of all our young people underpinned by our values of belong; inspire; challenge and celebrate. To deliver on that ambition, our financial and operational foundations must be strong, innovative, and aligned with our values.

This is a pivotal moment to join our Trust Executive Team. We are currently formulating our 2027–2030 Strategic Plan. As CFOO, you will play a central role in crafting this multi-year roadmap—turning strategic intent into resource strategy and ensuring that public money works as hard as possible for our students and communities.

This role goes beyond technical oversight. As part of the executive team, you will deputise for the CEO across key functions and represent the Trust across our schools and external networks. We are looking for a leader who brings deep professional expertise, strategic ambition, and the ability to hold tensions intelligently—balancing control with innovation and prudence with ambition.

You will lead a large, mature, and dedicated central team based at Oldham Sixth Form College. Their operational excellence provides a solid platform, allowing you to focus on high-level strategic direction, organisational development, and trust-wide improvement.

If you bring courage, strategic insight, and a passion for values-led leadership, we would be delighted to receive your application.

Warm regards,

Nick Lowry
Chief Executive Officer
The Pinnacle Learning Trust

PROUD TO BE PART OF THE Pinnacle LEARNING TRUST

Our Vision & Values

Our Vision

Our trust's vision is a simple one:
Transforming the life chances of all our young people.

Our Values

We aim to provide extraordinary opportunities for everyone, achieving a sense of belonging and significantly improving life chances.

Underpinning our daily activities are our values…

BELONG – INSPIRE – CHALLENGE – CELEBRATE



Welcome to The Pinnacle Learning Trust

'Transforming the life chances of all our young people.'

Founded in 2017, The Pinnacle Learning Trust ('our trust') is a multi-academy trust established by The Hathershaw College and Oldham Sixth Form College (OSFC). Since February 2019, our trust has also included Werneth Primary School, since April 2023, Broadfield Primary School, and since April 2024, Alexandra Park Junior School.

With a strong commitment to working locally (and regionally/nationally where possible and appropriate) and in partnership to support young people and improve their life chances, our trust is keen to support local schools within and beyond the trust, through professional development activity (see below) and through trust growth.

OSFC's designation as a Research School and our trust's role as a strategic partner in the local Teaching School Hub are ways in which we achieve this. Our trust is committed to a programme of carefully managed growth and development, always maintaining a core focus on excellent evidence-informed teaching and learning practice, together with securing the best possible outcomes and broader life experiences for the young people in our academies.

Our collective aim, articulated through our mission statement, is to improve the lives and life chances of young people through raising aspirations and achievement across our academies through the development of outstanding practice based upon partnership.

"A team united by the belief that every young person deserves the opportunity to thrive and achieve highly, in whatever form success takes for them."

Lizzie Egan-Walsh
OSFC Governor

"A true community where all involved buy into its ethos parents, pupils, staff and Governors."

Martin Griffin
Broadfield Governor

"I feel incredibly privileged to work alongside and support PLT. We play a vital role, in helping young people and families to thrive."

Suzy Hibbert
Chair of Governors
Hathershaw

2024-27 Strategic Priorities

Our current strategic plan is based upon the CST's seven domains of Building Strong Trusts Assurance Framework

1) High Quality, Inclusive Education

Collaborate to provide high quality inclusive education and an excellent, knowledge-rich curriculum, reflecting individual academy contexts, and building on trust strengths. Maximise the benefits of evidence informed practice and promote cultural capital and education for sustainable development for all young people, both through the core and extended curriculum (including enrichment, citizenship and social, emotional and mental wellbeing.

2) School/College Improvement at Scale (including Professional Development)

Working together to promote improvement and development across our academies, including through the sharing of resources and professional development. Further build on our trust's strong reputation for professional development within and beyond our trust, through the delivery of an extensive programme of evidence informed PD.

3) Expert Ethical Leadership

Ensure productive and effective relationships and communication, building a culture of expert, ethical leadership around our trust's purpose and values. In achieving this, promote, develop and provide values-led leadership at all levels, in line with our People Strategy.

4) Workforce Resilience and Wellbeing

Embed our Trust People Strategy, responding to national recruitment and retention challenges by focussing on our positive culture of belonging and collaboration, leaders and colleagues' wellbeing, workload reduction and professional development and ensuring a workforce that is resilient and well equipped to support the Trust's vision and values.

5) Strategic Governance

Promote and develop excellent governance at all levels through successful recruitment and succession planning, clarity of roles and purpose and effective practice, including the provision of timely, concise and consistent reporting. Valuing and developing trustees and LGBs, including compliance with all statutory obligations (e.g. safeguarding, health and safety, GDPR).

6) Public Benefit and Civic Duty

Build and maintain strong and effective strategic relationships within and beyond the local area to raise the profile of our trust, implement our growth strategy and promote our trust as 'partner of choice' for prospective joiners, professional development and for our offers to young people and their families. Enhancing and supporting our local communities through the provision of opportunities for our young people to play a positive and active role locally and beyond.

7) Finance and Operations

Evolve and extend the high quality of service, value for money and expert advice provided by our central teams, to support our principled and common approach to delivery of our trust operating model and growth strategy. Provide appropriate and effective systems and infrastructure to improve communication and collaboration across our trust.

Our Trust Journey So Far...

3
Education Phases

September 2017
Oldham Sixth Form College and The Hathershaw College establish The Pinnacle Learning Trust

July 2018
Sponsor accreditation achieved

February 2019
Werneth Primary School joins the Pinnacle family

5
Total number of academies

September 2019
OSFC achieves Associate Research School status

April 2023
Broadfield Primary School joins the Pinnacle family

September 2021
Pinnacle Learning Trust partners East Manchester Teaching School Hub as NPQ Lead

4499
Total number of students

September 2023
Pinnacle Learning Research School is launched (full Research School status)

November 2025
OSFC Sports Campus Opened

April 2024
Alexandra Park Junior School joins the Pinnacle family

September 2026
3g sports pitch at The Hathershaw College opened

2027
Werneth SEND unit soon to open...

655
Total number of employees

Our Central Services Team

Pinnacle Learning Trust has a strong, collaborative Central Services Team, providing expert support and guidance to our academies across a range of key areas, including Data Protection, Estates, Finance, Governance, Health and Safety, HR, IT, Marketing, Payroll and Staff Wellbeing.

Our central teams work closely with academy colleagues and leaders to provide high quality, responsive services, ensuring our academies have the support and resources they need to thrive.

We are committed to creating an environment where colleagues can flourish and be the best they can be. Through lifelong learning, professional development and clear career pathways, we support colleagues to grow and develop within our Trust. Each Central Services team has a Service Level Agreement, setting out the services provided and the respective responsibilities of the central team and academy colleagues.

Data Protection

We take the privacy and security of personal information seriously. Our in-house Data Protection Officer works with colleagues across the Trust to ensure compliance with legislation, maintain effective policies and procedures, provide staff training and minimise the risk of data breaches.

Estates and Health & Safety

Our Estates Team oversees the Trust's buildings and facilities, from day to day maintenance and grounds management to major construction and refurbishment projects. Working closely with academies, the team ensures our environments remain safe, suitable and fit for purpose.

Finance

Our Finance Team oversees the financial management and sustainability of the Trust. Through effective budget monitoring, financial reporting and strategic advice, we support informed decision making and ensure resources are used effectively. The team also manages statutory financial reporting, audits and budget forecast returns.

Governance and Support Services

Our Governance Professional supports effective, transparent and compliant governance across the Trust. Through aligned systems, processes and guidance, we promote strong strategic oversight, accountability and good practice.

HR, Payroll and Staff Wellbeing

Our HR team supports colleagues throughout their journey with the Trust, providing advice and guidance on recruitment, absence management, annual leave, policies, procedures and employee benefits. We aim to provide an approachable, responsive and high quality service, promoting colleague wellbeing and development.

IT and MIS Services

Our IT and MIS teams provide secure, reliable and effective technology and systems across the Trust. This includes technical support, infrastructure, digital strategy, management information systems and data analysis to support effective leadership, teaching, learning and decision making.

Marketing and Communications

Our Marketing Team promotes the Trust and its academies, sharing achievements, celebrating success and strengthening our reputation with families, partners, stakeholders and the wider community.

About The Role

Purpose of the post

The Chief Finance and Operations Officer (CFOO) is the executive leader responsible for the financial strategy, operational excellence, and infrastructure resilience across all five Trust academies.

Designated as the Chief Financial Officer (CFO) under the Academy Trust Handbook, the CFOO serves as a core executive director alongside the CEO. The postholder directly manages Finance, Estates, and IT, ensuring that non-academic operations directly enable high educational standards, cross-phase transition, and sustainable growth across primary, secondary, and post-16 settings.

Key Responsibilities

1. Financial Leadership and Compliance (Designated DfE CFO Role)

- **Statutory Oversight:** Act as the Trust's CFO, ensuring full adherence to the DfE Academy Trust Handbook, Academies Accounts Direction, UK GAAP, and Charity Commission regulations.
- **Financial Planning and ICFP:** Lead multi-year financial modeling, preparation of regular in-year financial forecasts, integrated curriculum and financial planning (ICFP), reserves policy management, and budget development across OSFC, Hathershaw, Broadfield, Werneth, and Alexandra Park.
- **DfE and Board Reporting:** Oversee statutory accounts, monthly management accounts, GAG pooling/reserves strategies, and financial reporting packages for the Finance & Resources Committee and Board of Trustees.
- **Audit and Risk Management:** Lead internal scrutiny, external audit processes, and the Trust-wide Risk Register reporting through to the Audit & Risk Committee.

2. Departmental Leadership and Line Management

Finance Operations (Direct Line Management: Head of Finance):

- Direct central finance operations, local school finance support, payroll, and procurement across all five academies.
- Oversee monthly budget variance reporting and deliver financial leadership training to Academy Principals and School Business/Office Managers.
- Oversee the financial analysis and monitoring of the Trust's gender pay gap, working collaboratively with HR/Finance to identify underlying causes and areas of concern. Ensuring accurate gender pay gap calculations, reporting and disclosure in accordance with applicable legislation and regulatory requirements.

Estates, Facilities and Health & Safety (Direct Line Management: Head of Estates):

- Lead the Trust's multi-site estates strategy, capital allocation (School Capital Allocation), decarbonization, and long-term site developments across primary, secondary, and post-16 campuses.
- Ensure robust statutory compliance with Health and Safety, fire risk assessments, and protective security procedures across all academy grounds.
- Direct contractor procurement, major building repairs, and facility lettings/commercial revenue generation.
- Oversight of the lettings strategy, particularly focusing on the Trust's sports facilities.



Infrastructure and Cyber Security (Direct Line Management: Head of IT Services, Data Protection Officer/GDPR Lead):

- Direct the Trust-wide Digital strategy, aligning digital infrastructure across primary classrooms, secondary learning environments, and post-16 cloud networks.
- Ensure full compliance with the DfE Digital Standards across all Trust academies and maintain robust cyber security frameworks, including achieving and sustaining Cyber Essentials Plus accreditation.
- Ensure robust cyber security defenses, vulnerability testing, disaster recovery plans, and network resilience.
- Standardise hardware procurement and licensing contracts across all sites to drive cost efficiency and value for money.
- Provide line management and operational governance oversight for data protection across the Trust, ensuring compliance with UK GDPR and the Data Protection Act 2018 while respecting and preserving the independent statutory reporting duty of the Data Protection Officer.

3. Strategic Trust Leadership and Operations

- Work closely with the CEO and other members of the Trust Executive Team to align operational strategy with educational delivery.
- Work in close partnership with the Trust Executive Team and Central HR to align workforce planning, payroll operations, and staff budget models across all Trust academies.
- **Governance:** Support Principals and Local Governing Bodies (LGBs) with local financial transparency, while driving Trust-wide compliance through the central scheme of delegation.
- **Due Diligence and MAT Expansion:** Lead financial, estates, and IT due diligence for potential new academies joining the Trust.
- The CFOO will deputise for the CEO when required.

Requirements of all Trust Staff:

- Promoting and upholding the Trust vision, mission and values
- Complying with the Trust's policies and procedures, including those relating to health and safety, safeguarding, welfare and security.
- Working positively and inclusively with colleagues, students, parents and other partners regardless of their gender, ethnicity, sexuality, age or disability.
- Attending briefings and staff meetings as required.
- Participating in the Trust's Performance Management Review scheme and undertaking professional development and training as required.
- Being a positive role model and taking responsibility for promoting good standards of behaviour and conduct in students.
- Undertaking other duties that are in accordance with the purpose and grade of the post as agreed with the CEO or designated alternate.

Relationship to other posts within the Trust

Reports To:

Chief Executive Officer (CEO)

Accountable To:

Board of Trustees (Finance and Resources Committee / Audit and Risk Committee)

Direct Line Management:

Head of Finance, Head of Estates, Head of IT Services and Trust Data Protection Officer.

Person Specification

Method of Assessment Key
Application Form & Supporting Letter - A
Interview - I
Reference - R
Enhanced DBS Clearance - DBS

The role of CFOO calls for a finance professional with the necessary experience, skills and personal qualities to be able to operate as part of a hard-working and highly motivated Trust Executive Team. There is an important role to play leading the Trust's finance functions and team in providing a robust financial infrastructure as well as an excellent opportunity to play an important and active part in the strategic direction of this forward looking, successful and thriving Trust.

This person specification will be used in shortlisting and interview to select the best candidate. Each applicant should therefore address the person specification in their written application and where appropriate should give examples of how they meet the criteria.

Qualifications & Professional Memberships	Essential (E) Desirable (D)	Method of Assessment
Full professional accounting qualification (CCAB: ACA, ACCA, CIMA, or CIPFA)	E	A
Commitment to ongoing professional development, and staying abreast with developments in the field.	E	A
Relevant Master's degree or MBA	D	A
Level 4+ Health & Safety qualification (e.g., NEBOSH / IOSH) or CSBM/DSBM	D	A
Experience & Leadership		
Executive-level financial leadership managing multi-million-pound budgets	E	A/I
Direct line management of multi-disciplinary teams (Finance, Estates, and IT)	E	A/I
Senior operational experience within a Multi-Academy Trust or education sector	D	A/I
Proven track record of strategic estate management and capital project delivery	E	A/I
Experience leading cyber security strategies and Trust-wide IT infrastructure	E	A/I
Experience centralizing services or onboarding new academies into a MAT	D	A/I
Stakeholder management for Board-level reporting	E	A/I/R

Technical Knowledge & Compliance	Essential (E) Desirable (D)	Method of Assessment
In-depth knowledge of the DfE Academy Trust Handbook and statutory accounting	E	A/I
Working knowledge of Integrated Curriculum and Financial Planning (ICFP)	D	A/I
Expertise in DFE funding frameworks (including 16–19 bursaries, GAG, and Pupil Premium)	E	A/I
Comprehensive understanding of statutory Health & Safety and Estates compliance	E	A/I
Knowledge of data protection regulations (GDPR) and cyber security frameworks	E	A/I
Personal Attributes & Trust Values		
Strong alignment with Trust values (Belong, Inspire, Challenge, Celebrate)	E	A/I
High ethical standards adhering to the Nolan Principles of Public Life	E	A/I/R
Knowledge of the Oldham community and commitment to improving outcomes in Trust academies.	D	A/I/R
Excellent interpersonal skills and ability to establish and maintain excellent working relationships with others.	E	I/R
Excellent communication and presentational skills	E	A/I
An enthusiastic and flexible approach to working routines and practices.	E	A/I/R
Understanding of the principles of confidentiality and the ability to handle sensitive data appropriately.	E	I/R
Patience and ability to remain calm.	E	A/I/R
Suitability to work with children.	E	DBS/R
Commitment to equality of opportunity and anti-discriminatory practice.	E	A/I
Sensitivity to community issues.	E	A/I
Empathy with children and young people and the provision of a quality service for young people.	E	A/I



How To Apply

Thank you for your interest in the role of **Chief Finance and Operations Officer**. We really look forward to receiving your application.

All applicants are requested to submit an application form and provide a supporting statement via MyNewTerm. To ensure that we have all the necessary information to enable us to consider your application, please ensure that you:

- Complete all sections of the MyNewTerm application form in full
- Use the supporting statement to show us how your knowledge, skills and experiences align with the person specification

MyNewTerm be accessed through our website
http://www.pinnaclelearningtrust.org.uk/vacancies/

The Application Deadline is Monday 30 November 2026 at 12 noon

References will be obtained after shortlisting and prior to the interview where it has been indicated that it is acceptable to do so. Please ensure that the contact details provided on your application form are correct.

Shortlisting will take place on **1 and 2 December 2026**
Interviews will take place on **10 December 2026**

Discussions with the CEO ahead of any potential application are strongly encouraged. To arrange a confidential conversation with the CEO please email **Danielle Hunt, PA to the the CEO on danielle.hunt@pinnaclelt.ac.uk**

Commitment to Safeguarding

As part of our safeguarding commitment and promoting the welfare of children, any offers of employment will be subject to satisfactory DBS checks as part of the pre-employment procedures on all potential new employees. The Pinnacle Learning Trust is an Equal Opportunities Employer and welcomes applications from underrepresented groups and ethnic minorities.


Belong
Inspire
Challenge
Celebrate
SHAW COLLEGE
RECEPTION

THE
Pinnacle
LEARNING TRUST





To find out more or to apply:

pinnaclelearningtrust.org.uk
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