



The Sycamore  
Church of England  
Trust

Grow together, Learn forever

# Operational Lead for Finance Recruitment Pack

**Closing Date:** Sunday 26<sup>th</sup> July 2026

**Shortlisting:** Monday 27<sup>th</sup> July

**Interviews:** Friday 31<sup>st</sup> July 2026



# Operational Lead for Finance

|                       |                              |
|-----------------------|------------------------------|
| <b>Working Hours:</b> | Full time, 37 hours per week |
| <b>Salary:</b>        | SCP 39 to SCP 40             |
| <b>Contract:</b>      | Permanent, all year round    |
| <b>Required From:</b> | 1st September 2026           |

## Help shape the financial future of a growing Trust

The Sycamore Church of England Trust is seeking an experienced and proactive finance professional to lead the operational delivery of finance across our growing Trust.

This is a key role working closely with the Chief Financial Officer to ensure strong financial systems, controls and reporting are in place across all schools, giving leaders and Trustees confidence in the Trust's financial position.

### As Operational Lead for Finance, you will:

- Lead day-to-day finance operations across the Trust
- Ensure robust financial controls and compliance
- Produce management accounts and support financial reporting
- Support schools with budgeting, forecasting and planning
- Oversee procurement activity and promote value for money
- Lead on audit preparation, payroll oversight and year-end processes
- Drive consistency and improvement in systems and processes
- Support and develop members of the finance team

### We are looking for someone who:

- Has strong experience in education or public sector finance
- Has AAT Level 4 (or working towards)
- Has a solid understanding of financial controls and compliance
- Has experience of management accounts and working with senior leaders
- Is a confident communicator with strong organisational skills
- Is collaborative, values-driven and committed to high standards

### In return we can offer:

- A key role in a growing and ambitious Trust
- The opportunity to shape and strengthen finance practice
- To work closely with senior leaders and influence decision-making
- A supportive, values-led organisation

If you would like an informal conversation about the role, please contact Mrs Maria Taylor on 0161 505 2519 or email [recruitment@thesycamoretrust.co.uk](mailto:recruitment@thesycamoretrust.co.uk).

Applications should be submitted via our online application system. If you experience any issues, please call us on 0161 505 2519.

**The Trust is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment. The successful candidate will be required to undertake an enhanced DBS check.**

## Job Description

|                      |                               |
|----------------------|-------------------------------|
| <b>Post Title</b>    | Operational Lead for Finance  |
| <b>Reporting to:</b> | Chief Financial Officer (CFO) |

## Main Purpose of the Role

The Sycamore C of E Trust is seeking to appoint an experienced and proactive finance professional to lead the day-to-day operational finance function across the Trust.

The role will ensure that robust financial processes, systems, controls and reporting arrangements are consistently applied across all schools and the central team, while supporting compliance, accuracy, value for money and financial assurance.

Working closely with the Chief Financial Officer, this role will provide strong operational leadership of finance activity, helping to maintain a high-quality, efficient and customer-focused finance service across the Trust.

## Core Responsibilities and Tasks

### Core Responsibilities

- Lead and manage the day-to-day delivery of the Trust's finance operations, ensuring accuracy, consistency and compliance across all academies.
- Ensure effective financial controls are in place and operating in accordance with the Trust's Financial Regulations, Scheme of Delegation and Academy Trust Handbook.
- Oversee transactional finance activity, ensuring timely and accurate processing of income, expenditure, payroll and balance sheet items.
- Act as the senior operational point of escalation for finance-related queries, issues and risks, escalating appropriately to the CFO.
- Support school leaders with budget monitoring, forecasting and financial planning.
- Ensure financial procedures and controls are applied consistently in line with the Trust's Scheme of Delegation and Financial Regulations.
- Monitor Trust cash flow and escalate any risks or concerns to the CFO.

### Financial Planning, Management and Reporting

- Produce timely and accurate monthly management accounts for the Trust and its schools, including variance analysis and narrative explanations for review by the CFO.
- Support school leaders with budget monitoring, forecasting and financial planning, providing appropriate challenge and advice where required.
- Coordinate the annual budgeting process across the Trust, ensuring school budgets are prepared in line with Trust assumptions, expectations and timescales.
- Maintain rolling forecasts to support medium-term financial planning and sustainability.
- Prepare financial reports, analysis and supporting schedules for Trustees, auditors and external agencies as required.

## Job Description

- Manage relationships with external HR and legal advisers, ensuring advice is used effectively and strategically.

### **Procurement and Value for Money**

- Support the CFO in the day-to-day operational delivery of the Trust's procurement framework, ensuring compliance with financial regulations, delegated authorities and public procurement requirements.
- Maintain oversight of procurement activity across the Trust, providing guidance to schools to ensure consistency, compliance and value for money.
- Maintain and monitor Trust-wide contracts register, ensuring contracts are appropriately documented, reviewed and renewed in line with agreed timescales.
- Support tendering and quotation processes at an operational level, including documentation, evaluation moderation and audit trails, in line with Trust policy.
- Identify opportunities to aggregate purchasing, standardise contracts or improve procurement efficiency across schools.
- Monitor spend against contracts and approved suppliers, escalating non-compliance or risk to the CFO as appropriate.

### **Compliance, Audit, Payroll and Pensions**

- Ensure day-to-day compliance with DfE, and Academy Trust Handbook requirements, escalating any concerns promptly to the CFO.
- Prepare audit working papers and act as a key operational contact for internal and external auditors.
- Oversee payroll and pension administration, ensuring accuracy, compliance with statutory requirements and adherence to agreed timetables.
- Support year-end processes, including accounts preparation, returns and statutory reporting, in line with DfE deadlines.

### **Systems, Processes and Improvement**

- Ensure effective and consistent use of the Trust's financial management and reporting systems across all schools.
- Identify opportunities to improve efficiency, consistency, value for money and financial resilience across the Trust.
- Support the CFO with the implementation of new financial systems, process changes or Trust-wide initiatives as required.
- Contribute to the development, review and embedding of Trust-wide financial policies and procedures.

### **Leadership, Support and Partnership Working**

- Line manage members of the central finance team, setting clear expectations, providing coaching and supporting professional development.
- Work collaboratively with school leaders, administrators and other central teams to ensure finance supports educational priorities.

## Job Description

- Promote a supportive and customer-focused finance culture aligned with the Trust's Christian ethos and values.

## Corporate Responsibilities

**All employees of The Sycamore CE Trust have a responsibility for, and must be committed to, safeguarding, and promoting the welfare of children and young people and for ensuring that they are protected from harm.**

In addition, we expect all employees to:

- Be aware of, support and contribute to the ethos and values of the Trust.
- Recognise own strengths and areas of expertise and use these to support and advise others.
- Participate in training and other learning activities and performance development as required.
- Familiarise themselves with, and adhere to, all relevant Trust Policies and Procedures
- Comply with the Trust's Health and Safety requirements.
- Maintain high professional standards of attendance, punctuality, appearance, conduct and positive, courteous relations with students, parents, and colleagues

This is an outline job description only and the post holder will be expected to undertake duties commensurate within the range and grade of the post or any other reasonable duties as directed by the Trust. Duties may be subject to periodic review, in consultation with the postholder, to reflect the changing work composition of the Trust.

| Person Specification  |                        |   |
|---|------------------------|---|
| Qualifications, Knowledge, Skills, and Experience   | Essential or Desirable | Assessment Method                         |
| <b>Education and Qualifications</b>   |                        |   |
| Currently holds an AAT (Level 4) Qualification  | Essential              | Application Form, Interview, Certificates |
| Currently working in an education finance environment.  | Essential              |   |
| Currently holds or is working towards or willing to work towards a relevant management level qualification/affiliation from a recognised professional body, such as ICAEW, ACCA, CIMA or CIPFA. | Desirable              |   |
| Evidence of relevant and recent professional development with a willingness to continue.  | Essential              |   |
| <b>Knowledge and Understanding</b>  |                        |   |
| Strong understanding of financial processes and controls within an education or public-sector environment.  | Essential              | Application Form, Interview, Reference    |
| Knowledge of academy finance requirements, including DfE compliance.  | Essential              |   |
| Understanding of school-based budgeting, forecasting and financial reporting.   | Essential              |   |
| Experience of operating within financial regulations and delegated procurement thresholds.  | Essential              |   |
| Understanding of value for money principles in a public sector or education environment.  | Essential              |   |
| Experience supporting procurement or tendering activity within a school, MAT or public sector organisation.   | Desirable              |   |
| Experience maintaining or using contract registers.   | Desirable              |   |
| <b>Key Competencies</b>   |                        |   |
| Significant experience in an education finance or similar public-sector setting.  | Essential              | Application Form, Interview, Reference    |
| Experience of producing management accounts and working with budget holders.  | Essential              |   |
| Experience of supporting audits and ensuring financial compliance.  | Essential              |   |
| Experience of working across multiple schools or sites.   | Desirable              |   |

| Key Competencies   |           |  |
|--|-----------|--|
| Experience of line managing or supervising staff.  | Desirable |  |
| Skills and Attributes  |           |  |
| Highly organised with strong attention to detail.  | Essential | Application Form, Interview, Reference |
| Ability to prioritise, meet deadlines and work under pressure.                           | Essential |  |
| Confident communicator, able to explain financial information to non-finance colleagues. | Essential |  |
| Motivation and Personality   |           |  |
| Values-driven and aligned with the ethos of a Church of England Multi Academy Trust.     | Essential | Application Form, Interview, Reference |
| Collaborative, supportive and professional in approach.                                  | Essential |  |
| Resilient, adaptable and positive in a growing and changing environment.                 | Essential |  |
| Additional Requirements  |           |  |
| Willingness to work flexibly within the scope of the role.                               | Essential | Application Form, Interview,           |
| Willingness to travel across Trust schools as required.                                  | Essential |  |