

Operational Lead for Finance

Recruitment Pack

Closing Date: Sunday 16th August

Shortlisting: Monday 17th August

Proposed Interview Date: Thursday 20th August



Operational Lead for Finance

Working Hours:	Full time, 37 hours per week
Salary:	SCP 39 to SCP 40 (£50,269 - £51,356)
Contract:	Permanent, all year round
Required From:	1st September 2026

Help shape the financial future of a growing Trust

The Sycamore Church of England Trust is seeking an experienced and proactive school or academy trust finance professional to lead the operational delivery of finance across our growing Trust. Reporting to the CFO, this is a key Trust-wide role working across multiple schools, ensuring strong financial systems, controls and reporting are in place giving leaders and Trustees confidence in the financial position.

This role is best suited to someone who already understands school or academy trust finance and can apply that knowledge from the outset. Applicants are expected to have current or recent experience of working in education finance, ideally within a multi-academy trust, local authority education finance team or similar public-sector education setting.

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 current or recent experience in school, academy trust or local authority education finance and can demonstrate a strong understanding of the financial environment in which schools operate
- Holds AAT Level 4, or an equivalent finance qualification
- 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

Applicants should use their application to clearly evidence their current or recent experience of school, academy trust or local authority education finance, including examples of budget monitoring, management accounts, financial controls, audit preparation and working with

school leaders. Applications that do not demonstrate relevant education finance experience may not be shortlisted.

If you would like an informal conversation about the role, or would like to discuss whether your school, academy trust or local authority education finance experience is a good match, please contact Mrs Maria Taylor on 0161 505 2519 or email 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	
Post Title	Operational Lead for Finance
Reporting to:	Chief Financial Officer (CFO)
Main Purpose of the Role	
The Sycamore CE Trust is seeking to appoint an experienced and proactive education finance professional to lead the day-to-day operational finance function across the Trust, bringing the school finance knowledge needed to provide confident support to schools from the start. 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, and reporting to, 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, ensuring matters are escalated to the CFO where they require strategic oversight, approval or further action. • 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, commentary and clear explanations of key risks, trends and budget pressures for review by the CFO. • Support school leaders with budget monitoring, forecasting and financial planning, providing informed challenge and advice based on a sound understanding of school funding, staffing cost pressures and academy trust financial controls.	

Job Description

- 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.

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 operational oversight of procurement activity across the Trust, providing guidance to schools to support 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 requirements, Academy Trust Handbook expectations and Trust financial procedures, 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.

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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.
- 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
Education and Qualifications		
Currently holds AAT Level 4 or an equivalent finance qualification.	Essential	Application Form, Interview, Certificates
Currently working in a school, academy trust or local authority 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	
Knowledge and Understanding		
Strong understanding of financial processes and controls within an education or public-sector environment.	Essential	Application Form, Interview, Reference
Strong working knowledge of academy finance requirements, including the Academy Trust Handbook, DfE compliance expectations, internal financial controls, delegated authorities and school-level budget monitoring.	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	
Key Competencies		
Significant experience in school, academy trust or local authority education finance, with evidence of working directly with school budgets, financial controls and budget holders.	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	

Person Specification		
Qualifications, Knowledge, Skills, and Experience	Essential or Desirable	Assessment Method
Key Competencies (continued)		
Experience of working across multiple schools, academies or sites, with the ability to manage competing priorities and provide consistent financial support to a range of school leaders and budget holders.	Essential	
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, Reference
Willingness to travel across Trust schools as required.	Essential	