



The Hanley and Upton Educational Trust

Chief Finance and Operations Officer (CFOO) Application Pack





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Welcome from the CEO

Dear Applicant,

Thank you for your interest in the position of Chief Finance and Operations Officer (CFOO) at the Hanley and Upton Educational Trust. This is an exciting opportunity to join our thriving, ambitious multi-academy trust at an important phase in its development.

This vacancy has arisen following the retirement of a valued colleague who has been part of the Trust since 2011.

The HUET is a family of four schools serving the beautiful rural and semi-rural communities of Southwest Worcestershire including the villages of Hanley Castle, Kempsey, Welland, and Hanley Swan. Our schools are rated highly by Ofsted, and Hanley Castle High School has again been recognised in The Times School League Tables; an accolade that reflects its longstanding reputation for academic excellence.

Our mission is clear for our schools: we aspire for a culture where every individual feels valued, respected, and empowered to make a positive contribution to the world. We are proud to be an anchor institution in our community committed to inclusion, sustainability, and continuous improvement.

Our values - Belong, Aspire, Achieve - run through everything we do.

The Trust is in a strong financial position, and we are now seeking a CFOO who shares our ambition to build on this foundation and enable even greater educational success. This role is central to our vision of becoming a sector-influencing trust. You will work closely with me and our leadership team to ensure exemplary service in all operational and financial areas, driving innovation and efficiency while safeguarding the resources that allow our children and young people to truly thrive.

If you are an experienced Business Leader, or a finance professional who wants to make a transformative impact in education, combining strategic leadership with operational excellence, then we would love to hear from you. Together, we can shape a future where our schools continue to excel, and our Trust becomes a beacon of best practice for our region and beyond.

I look forward to working with you.

Best wishes

Mark Stow
CEO - Hanley and Upton Educational Trust

About the Hanley and Upton Educational Trust

OUR MISSION

We aim to be the Trust of choice, working in partnership with the families in our area. As a community of distinctive schools, we are united by our common purpose:

To create a school culture in which every individual feels valued, respected, and encouraged to make a positive contribution to the world.

Our ambition is that our children and young people:

***Belong** to a happy, safe and caring community where equality, diversity, and service are celebrated.*

***Aspire** for excellence. Regardless of background and prior learning experiences, all are encouraged to fully develop their talents and abilities within and beyond our rich curriculum.*

***Achieve** their full potential and leave the care of the partnership with the skills and personal qualities required to understand the world, contribute to society, and change it for the better.*

HOW WE WORK

ANCHOR INSTITUTION

We are proud to serve our unique local communities. Working with families and local organisations, we nurture our children and young people to become responsible citizens. We are committed to our inclusive approach to education, and to working in an environmentally sustainable way.

ALIGNED AUTONOMY

We celebrate each school's unique context, and work together to build our collective professional knowledge and agree core principles, which underpin our Trustees' and leaders' decision making.

ALWAYS LEARNING

We are an outward-facing group of schools that take an evidence-informed approach to education. We know learning isn't just for children and young people; we are driven by our professional curiosity and desire to continuously improve.

PROFESSIONAL FAMILY

We value our strong relationships built on trust, care, respect and open communication. These enable our children, young people, and staff to truly thrive.

Key Information



KEY DATES AND APPLICATION PROCESS

Closing date:

9.00am 21 January 2026

Interview Date:

Week commencing 26 January 2026

How to apply:

The application form is attached as a separate word document.

Completed application forms should be accompanied by a covering letter and sent to Sarah Moon, HR Officer by the closing date via moons@hanleycastlehs.org.uk

Curriculum vitae will not be accepted.

Address:

Hanley Castle High School
Church End
Hanley Castle
WR8 0BL

Tel: 01684 593241

Benefits of working for us:

- Secure and competitive pension
- Access to a Blue Light Card
- Commitment to professional development for all, including 8 training days per annum
- Access to a cycle to work scheme
- Free on-site parking with EV charging points
- Free access to Westfield Health, Healthy Extras providing:
 - 24/7 telephone access to a practising UK GP
 - 24 Hour Advice & Information Line (including structured counselling sessions)
 - Eldercare Advice
 - Discounts and offers at hundreds of retailers, restaurants and destinations
 - Gym discounts

Safeguarding Statement:

The Trust is committed to safeguarding and promoting the welfare of children and young people and expects all staff to share this commitment. The successful applicant will be required to undertake an Enhanced Disclosure via the Disclosure & Barring Service.

Online searches are now undertaken on all shortlisted candidates, for safeguarding suitability, as part of the due diligence.

References are obtained, before interview wherever possible, which include specific enquiries about the applicant's background in relation to safeguarding.

The Chief Finance and Operations Officer (CFOO)

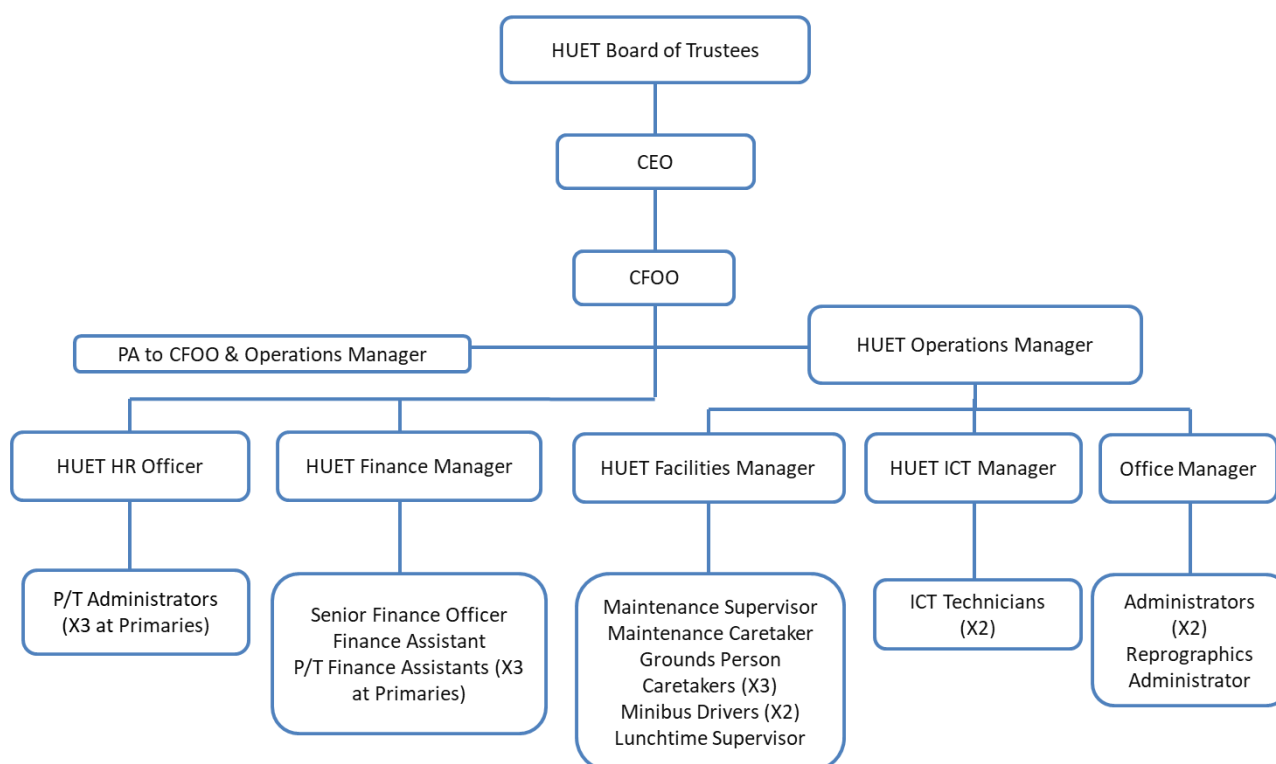
The Chief Finance and Operations Officer (CFOO) at the Hanley and Upton Educational Trust is a key member of the executive team, supporting the CEO (Accounting Officer), the Board of Trustees, and the headteachers with overall responsibility for the financial health and operational efficiency of the trust. The CFOO provides strategic financial leadership to ensure the long-term sustainability of the trust through robust financial management and control, accurate reporting and budget oversight, compliance, strong governance and accountability.

As CFOO, you will provide financial leadership while driving the trust's IT and estates investment strategy to align with organisational priorities. You will also oversee HR and GDPR compliance, promote staff wellbeing, and contribute to strategic workforce planning to achieve the trust's long-term goals.

The CFOO oversees the work of the Trust Operations Manager who has responsibility for the strategic leadership and operational management of the Trust IT and Facilities teams, and the Hanley Castle High School reception.

The CFOO provides professional leadership and management of school support staff, ensuring high standards of performance, working in partnership with teaching staff to enhance effectiveness and improve standards of learning and achievement.

HUET CFOO Organisation Chart



Job Description

Post	Chief Finance and Operations Officer
Terms and Tenure:	Full-time, Permanent Leadership Pay Scale, L16 – L24 (£75,049 - £91,158) Flexible working options and salary scale negotiable for exceptional candidates
Work Location	The Hanley and Upton Educational Trust (HUET)
Line Manager:	Chief Executive Officer
Staff line managed indirectly	4 Direct, 24 overall (approximately) The CFOO directly line manages the following trust wide roles: Finance Manager, HR Officer, Operations Manager and Data Protection Officer
Start Date	1 September 2026 (or earlier by negotiation)

Finance	<p>The Chief Finance and Operations Officer will provide:</p> <p>Strategic financial leadership and planning</p> <ul style="list-style-type: none"> • Act as key advisor to the CEO and Board of Trustees on financial implications of key decisions. • Support the CEO and Board of Trustees in shaping the trust's long term financial strategy in line with the educational priorities and vision of the trust. • Ensure long term financial sustainability and growth. • Provide financial modelling and forecasts to inform any strategic decisions. • Provide regular updates for HUET Board on trust's financial situation to inform any future strategic decision making. • Assume accountability for the overall financial operations of all schools in the trust. • Ensure the trustees have the information required to ensure budgets are balanced, resources are used effectively and reporting is accurate. <p>Financial management</p> <ul style="list-style-type: none"> • Lead the budgeting process and deliver reliable financial forecasts to support decision making in line with DfE timescales. • Oversee accurate and timely monthly financial reporting to include income and expenditure against budget, balance sheet, cashflow and performance against KPIS. • Provide financial reports in a timely manner for CEO and HUET Board and any relevant committees of the Board e.g. Staffing and Performance and Audit and Risk. • Manage cashflow forecasting and reserves for individual schools and trust in line with reserves policy. • Develop a 3–5-year financial plan for the trust with realistic assumptions. • Use financial management information, especially benchmarking tools, to analyse trends, conduct financial health checks and identify opportunities for greater

	<p>efficiency.</p> <ul style="list-style-type: none"> • Align curriculum planning with financial sustainability for the trust. • Investigate alternative income generating opportunities for the trust to support educational priorities. <p>Compliance, reporting and audit</p> <ul style="list-style-type: none"> • Ensure there is clear delegation of responsibilities and communication between trustees, headteachers and middle leaders across the organisation.
Risk Management	<p>The Chief Finance and Operations Officer will:</p> <ul style="list-style-type: none"> • Lead on effective risk management and overall mitigation across the trust. • Maintain the trust risk register and review on a regular basis. • Manage financial risks across the trust and maintain liquidity for operational stability. • Maintain strong financial controls, a clear scheme of delegation and key finance policies and procedures. • Ensure business continuity plans and procedures are robust.
Human Resource Management	<p>The Chief Finance and Operations Officer will:</p> <ul style="list-style-type: none"> • Set direction and provide assurance for HR strategy aligned with the trust's vision, growth plans, and workforce planning; advise senior leaders and the Board. • Define and monitor trust-wide standards for recruitment, retention, and the full employment cycle, assuring consistent practice across all academies through the HR Officer. • Monitor adherence to employment law, safeguarding, GDPR, and trust policies; ensure staff understand policies and complete required training. • Provide strategic oversight to the HR Officer on employee relations matters (grievances, disciplinarys), ensuring fair processes and alignment with trust objectives; track trends and risks. • Ensure centralised HR, payroll, and personnel record systems are maintained with robust controls, data quality, and reporting. • Support CPD and wellbeing frameworks, and oversee change management (e.g., restructuring, cultural integration) to support a healthy, high-performing workforce.

Operations	<p>The Chief Finance and Operations Officer will:</p> <ul style="list-style-type: none"> • Provide strategic advice to the CEO/Board and lead performance oversight of the Operations Manager. • Integrate financial, estates, and IT planning to support educational priorities. • Ensure compliance with the Academy Trust Handbook, Funding Agreements, and statutory requirements including GDPR; oversee business continuity and emergency planning. • Oversee estates and IT strategies—including condition surveys, capital projects/CIF bids, health & safety, reliability, and cybersecurity—with timely reporting to the HUET Board. • Lead trust-wide procurement and sustainability, ensuring compliant, value-for-money contracts and a DfE-aligned sustainability programme (carbon reduction, energy efficiency, sustainable procurement) with Board reporting.
Other	The post holder will be expected to work constructively as part of a team. This job description is not necessarily a comprehensive definition of the role. It will be reviewed from time to time, and it may be subject to modification or amendment at any time after consultation with the holder of the post.
Health and Safety	The post holder is required to make positive efforts to maintain their own personal safety and that of others by taking reasonable care, carrying out requirements of the law following recognised codes of practice. The post holder is also required to be aware of and comply with the LA and School's policies on health and safety.
Commitments	Commitment to the community ethos of the school, and helping to promote appropriate standards of conduct when dealing directly with pupils.
Data Protection	During employment, the holder of the role will have access to data and personal information that must be processed in accordance with the terms and conditions of the Data Protection Regulations and in accordance with the HUET Data Protection Policy.

Person Specification

	Essential	Desirable
Qualifications	<ul style="list-style-type: none"> Professional accountancy qualification (ACA, ACCA, ACMA, CIPFA). Evidence of continuing professional development in financial management and strategic planning. 	<ul style="list-style-type: none"> Recognised management/business degree or equivalent related professional qualification.
Professional knowledge and experience	<ul style="list-style-type: none"> Experience in strategic financial leadership. Significant leadership and management experience, including leading diverse teams and operational areas. Experience in budget preparation and forecasting, and management reporting. Managing strategic financial plans. Experience in delivering value-for-money initiatives and driving operational efficiencies. Experience of overseeing HR, Facilities and IT within a medium or large organisation Strong leadership and team management skills, with the ability to motivate and influence. Strong working knowledge of finance systems. Excellent financial knowledge. Strong analytical and problem-solving skills, with sound judgment. Highly effective communication and interpersonal skills, with the ability to adapt style and approach to engage and influence a wide range of stakeholders. Able to strategically influence decision making within the trust. Highly organised and able to prioritise effectively under pressure. Ability to build strong relationships with all key stakeholders and work collaboratively. 	<ul style="list-style-type: none"> Experience of operating at Senior Management Team level, contributing to strategic decision-making. Experience in financial management within a multi-academy trust, with knowledge of academy funding streams and compliance requirements.

Personal Qualities	<ul style="list-style-type: none"> • Willingness and enthusiasm to constructively challenge the work of self and others to continually improve own and team performance. • Clear strategic vision and ability to see the bigger picture. • Self-motivated with strong personal drive. 	
Equal Opportunities	<ul style="list-style-type: none"> • Acceptance of, and a commitment to, the principles of the school's equal opportunities policies and practices as they relate to the delivery of services to students. • Commitment to equal opportunities policies relating to all protected characteristics in an educational context. 	
Safeguarding	<ul style="list-style-type: none"> • Good knowledge and understanding of the importance of safeguarding students and the welfare of staff and the action to take to support this. • Displays commitment to the protection and safeguarding of children and young people. 	<ul style="list-style-type: none"> • Up-to-date knowledge of safeguarding legislation and practices.

