



# South Pennine Academies

An excellent education for everyone

## RECRUITMENT PACK

**Post:** Chief Financial Officer

**Date:** May 2026





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An excellent education for everyone

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KUDU Search Careers Ltd has been retained to deliver the initial phase of this project. All direct or third-party enquiries will be forwarded accordingly. [www.kudusearch.careers](http://www.kudusearch.careers) See Page 15 for more information.



# WELCOME FROM THE CEO

Dear Potential Colleague,

South Pennine Academies is a values-led trust, anchored in integrity, inclusion and ambition. These values shape how we lead, how we work together and how we serve our schools, pupils and communities.

At heart, we are a group of education professionals who believe deeply in the power of schools to change lives. We are professional, committed and ambitious, but we are not corporate. We work with people, for people and through people. We care about our colleagues, enjoy working together and believe that warmth, humour and humanity matter.

Our schools serve communities with many strengths, but also with significant challenges. Many of our children and families face social and economic disadvantage, barriers to opportunity, and wider pressures that can affect wellbeing, attendance and achievement. We know excellent education can transform lives, and we are determined that South Pennine Academies plays a leading role in that transformation.

Our five-year strategic plan sets out an ambitious direction of travel, focused on sustainable improvement, educational excellence, investment in people, long-term organisational resilience and better outcomes for pupils. Financial leadership is therefore not a support function on the margins of our work. It is integral to achieving our mission.

The CFO we appoint will understand this deeply. We are looking for someone who combines strategic finance expertise with moral purpose; someone who sees beyond budgets and balance sheets to the difference wise financial stewardship makes in classrooms, staffing, opportunity and children's futures.

There is important work already underway. We have made progress across many aspects of our finance strategy, and this appointment represents an opportunity to build on that foundation. The next stage will include refining the finance team into a fully shared service model, continuing the move towards full centralisation, and strengthening areas such as procurement, treasury management, financial insight and resource planning.

Strong controls, compliance, governance and stewardship are essential. But we also want someone who can innovate within those frameworks; someone solution-focused and pragmatic, who can help finance better support our strategic priorities and ensure we get the greatest possible impact from the resources available to us.

The successful candidate will communicate with clarity, make technical detail accessible, and build strong relationships with colleagues from a range of backgrounds. We are looking for someone enthusiastic, energetic and dedicated; someone who brings clarity, credibility and warmth, and who will work in partnership with school and trust leaders to help deliver our ambitions.

If you are inspired by the opportunity to use your financial leadership to help shape educational success and contribute to a trust with a clear moral purpose and ambitious future, we would be delighted to hear from you.

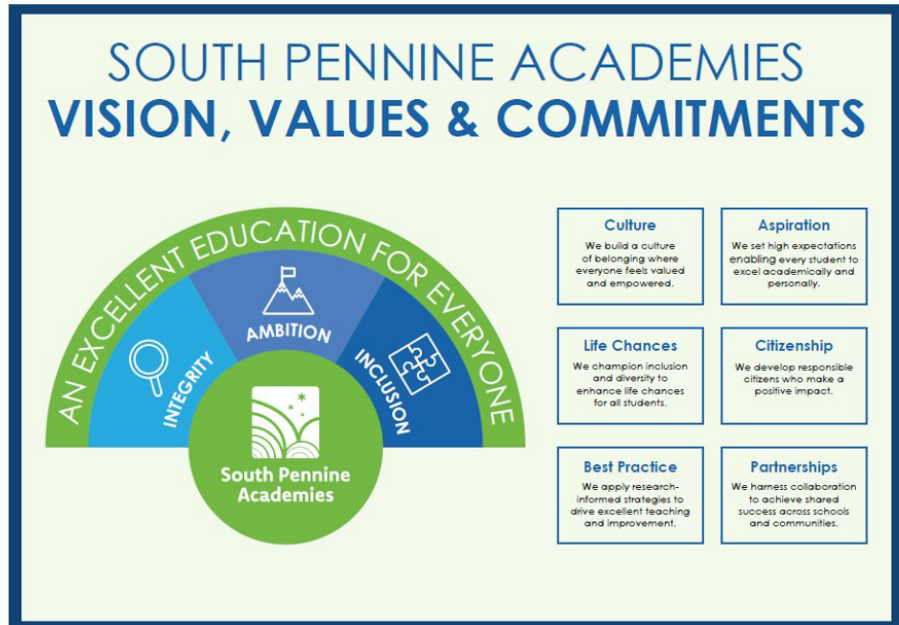
Yours sincerely  
**Alison Black**, CEO



# ABOUT SOUTH PENNINE ACADEMIES

At SPA, we place **integrity, ambition and inclusion** at the heart of everything we do.

We are committed and passionate to making a positive impact on the communities we serve and believe through a high-quality education providing **an excellent education for everyone.**



Integrity | Ambition | Inclusion - Excellent education for everyone

## WHY JOIN US

- **Partnerships:** The Trust is committed to developing partnerships with our academies, the communities we serve and external organisations.
- **Family of schools:** Each SPA school is unique and serves a distinct community, which is central to our approach to school improvement.
- **Collaboration:** We promote strong collaboration to bring drive, expertise and capacity to the Trust which allows our academies to flourish.
- **Ambition:** We are committed to providing the very best educational experience for our pupils to succeed and achieve.
- **Inclusion:** we place inclusion at the heart of everything we do as we are committed and passionate about making a positive impact on the communities we serve.
- **Strong culture:** We have established a positive school culture focused on integrity, ambition and inclusion.



# JOB ADVERT

## CHIEF FINANCIAL OFFICER

Elland, Halifax

£80,000 – £100,000 + excellent pension and benefits

**South Pennine Academies** is a cross-phase Trust of 11 primary and secondary academies, alongside a school-based Initial Teacher Training provider, Huddersfield Horizon SCITT.

Their vision is clear: to achieve an excellent education for everyone. This is brought to life through the values of Integrity, Ambition and Inclusion. Success is about more than academic outcomes; it is also about belonging, aspiration and opportunity for all.

**This is a role for a CFO who wants their impact to be felt across an organisation, not just reflected in its reports.**

It offers the opportunity to shape how financial thinking supports decision-making, influences behaviour and contributes to better outcomes for pupils. The Trust is looking for someone who can bring clarity and perspective to conversations, helping colleagues understand not just the numbers, but what they enable.

At the same time, this is a role operating within a highly regulated, publicly funded environment where governance, control and compliance are critical. The Trust already benefits from strong financial discipline, robust audit and well-established controls. Maintaining that integrity is fundamental. Any evolution of the function must be built on those solid foundations.

Working closely with the Chief Executive and senior leadership team, the CFO will act as a trusted partner and sounding board. The role carries genuine influence, with responsibility for ensuring that financial insight is embedded into both strategic and day-to-day decision-making across the Trust. This includes engaging directly with headteachers and school leaders, building relationships that allow finance to be understood, valued and actively used.

The environment is collaborative, open and values led. There is a strong sense of shared purpose, and an expectation that finance plays its part in that culture — contributing constructively, offering balanced challenge and helping colleagues navigate complexity with confidence.

The Trust is well established and financially secure. Governance is strong, audit is well managed and the fundamentals of financial control are firmly in place. These foundations provide confidence and must be maintained. The opportunity now is to build on them.

There is scope to further develop the way financial information is produced and used, improving accessibility, timeliness and relevance. Systems and processes can continue to evolve, with increasing use of automation, technology and AI to improve efficiency and reduce friction. Financial planning, forecasting and longer-term modelling will play an important role in supporting sustainability and informed investment decisions.

More broadly, the Trust is looking to strengthen the role finance plays in shaping thinking around value, efficiency and the effective use of resources. This requires a CFO who is comfortable operating beyond the boundaries of the function, bringing insight into wider discussions and helping others engage with financial considerations in a practical and meaningful way.

The successful candidate will be a qualified accountant (ACA, ACCA, CIMA, CIPFA) with experience of operating at a senior level within a complex organisation. Experience within education or the public sector is helpful. Equally important is the ability to work within a well-governed, publicly accountable environment, and to balance financial discipline with a forward-looking, solutions-focused approach.

This role will suit someone who enjoys working with people, who brings a pragmatic and thoughtful style, and who is motivated by the opportunity to contribute to an organisation with clear purpose. It will particularly appeal to those who see finance as a means of enabling progress, not simply controlling it.

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## Process, Safeguarding and Compliance

The appointment is subject to a satisfactory enhanced Disclosure & Barring Service check and the Academy's Safer Recruitment policy and procedures.

South Pennine Academies is committed to safeguarding and promoting the welfare of children and young people. All workers, volunteers and employees are expected to share this commitment. In line with statutory expectations, strong governance, financial oversight and safeguarding arrangements must be maintained at all times.

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# JOB DESCRIPTION

## Chief Financial Officer

### South Pennine Academies

<b>Reporting to:</b>	Chief Executive Officer
<b>Responsible for:</b>	Central Finance Team and relevant finance-related functions
<b>Location:</b>	Trust central office, with regular travel across Trust academies
<b>Contract:</b>	Permanent. Term time plus 10 days.
<b>Hours:</b>	37 per week. The post is offered on an all-year-round basis; however, term-time-only working will be considered.
<b>Salary:</b>	£80,000 - £100,000
<b>Disclosure Level:</b>	Enhanced DBS check, including barred list check where applicable
<b>Section 128:</b>	Required, as this is a senior management role involving management of staff and/or budgets

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## Purpose of the Role

The Chief Financial Officer will provide strategic and operational financial leadership across South Pennine Academies, ensuring that the Trust maintains the highest standards of financial control, governance, compliance, regularity, propriety and value for money.

The postholder will be responsible for leading a finance function that is accurate, timely, efficient and trusted, while also developing its wider strategic contribution to the Trust. This will include improving the quality of financial insight, strengthening budget planning, supporting academy leaders to make informed decisions, and ensuring that resources are used effectively in support of the Trust's educational mission.

The role requires a finance leader who can preserve the Trust's existing strength around governance and assurance, while helping finance become more visible, collaborative, proactive and useful to academy leaders and the wider executive team.

## Key Responsibilities

### Strategic Financial Leadership

- Provide strategic financial advice to the CEO, Trustees, Executive Team and relevant committees.
- Lead the development and delivery of the Trust's financial strategy, ensuring alignment with the Trust's vision, values, growth plans and educational priorities.
- Develop long-term financial models, scenario planning and sensitivity analysis to support strategic decision-making.

- Advise on the financial implications of Trust development, including growth, academy transfers, capital investment, curriculum planning, staffing structures and central service design.
- Support the Trust in making disciplined, evidence-based decisions about resource allocation, investment and value for money.
- Ensure finance is experienced across the Trust as a supportive, intelligent and enabling function, not simply as a mechanism of control.

## Governance, Compliance and Control

- Ensure the Trust complies with the Academy Trust Handbook, funding agreement, Companies Act requirements, Charity Commission expectations, Academies Accounts Direction, internal policies and all relevant financial regulations.
- Maintain robust systems of internal control, financial delegation, budgetary discipline, procurement compliance and risk management.
- Lead preparation for external audit, internal scrutiny and any relevant regulatory review.
- Ensure timely, accurate completion and submission of statutory returns, budget forecasts, annual accounts and other required financial information.
- Maintain appropriate segregation of duties, financial records, bank controls, asset registers and approval processes.
- Ensure financial management reflects the principles of regularity, propriety, value for money and feasibility. The Academy Trust Handbook describes the framework for financial governance, management and controls, and confirms that compliance is a condition of academy trust funding agreements.

## Budgeting, Forecasting and Management Information

- Lead the Trust-wide budgeting and forecasting process, ensuring budgets are realistic, properly scrutinised and clearly understood.
- Produce high-quality monthly management accounts, cash flow forecasts, variance analysis and financial reports for the CEO, Board, committees and academy leaders.
- Ensure financial information is clear, timely, relevant and accessible to non-finance colleagues.
- Support headteachers and senior leaders to understand the financial implications of operational decisions.
- Develop more useful management information that links financial performance to educational priorities, pupil numbers, staffing, curriculum, reserves, risk and sustainability.
- Challenge assumptions constructively and provide options rather than binary answers wherever possible.

## Finance Function Leadership

- Lead, manage and develop the central finance team, ensuring clarity of roles, high standards, accountability and continuous improvement.

- Review finance processes, systems, workflow and team capability to identify opportunities for improvement, automation, efficiency and better service.
- Build a finance culture that is accurate, compliant and responsive, but also curious, collaborative and solution focused.
- Ensure routine financial processes are completed efficiently so that senior finance capacity can be directed towards planning, analysis, insight and improvement.
- Promote professional development, resilience and succession planning within the finance team.

## Partnership with Academies and Stakeholders

- Build trusted, visible and productive relationships with headteachers, academy leaders, central colleagues, Trustees and external stakeholders.
- Understand the different pressures, contexts and priorities across individual academies.
- Provide financial advice that is technically sound but also practical, proportionate and sensitive to school-level realities.
- Work collaboratively with HR, operations, estates, governance, education and inclusion colleagues to support joined-up planning.
- Represent finance positively across the Trust, helping leaders see finance as a partner in improving outcomes and life chances.

## Procurement, Contracts and Value for Money

- Ensure procurement activity is compliant, transparent, ethical and capable of demonstrating value for money.
- Support strategic procurement, contract review and supplier management across the Trust.
- Identify opportunities for efficiency, collaboration, cost control and improved use of resources.
- Advise on capital projects, estates investment, funding options and affordability.
- Ensure public funds are used for their intended purpose and in line with delegated authority and procurement requirements.

## Risk, Audit and Assurance

- Maintain and develop financial risk management processes.
- Support the Audit and Risk Committee with clear reporting, assurance and recommendations.
- Ensure audit recommendations are acted upon promptly and embedded properly.
- Contribute to the Trust's wider risk register, business continuity planning and internal scrutiny arrangements.
- Ensure financial controls reduce the risk of fraud, error, waste and non-compliance.

## Safeguarding, Conduct and Corporate Responsibilities

- Promote and uphold the Trust's commitment to safeguarding and promoting the welfare of children and young people.
- Comply with the Trust's Safer Recruitment Policy, Safeguarding and Child Protection Policy, Staff Code of Conduct, financial procedures and all relevant Trust policies.
- Maintain high standards of integrity, confidentiality, professional conduct and public accountability.
- Promote equality, diversity, inclusion, health and safety, and the Trust's values of integrity, ambition and inclusion.
- Engage in continuing professional development and maintain up-to-date knowledge of academy finance, regulation, governance and sector developments.
- Undertake any other duties commensurate with the seniority and scope of the role.

# PERSON SPECIFICATION

## Chief Financial Officer

E = Essential  
D = Desirable

A = Application Stage  
I = Interview and Assessment stage  
T = Task /assessment exercise  
R = References

### Qualifications and Professional Standing

Fully qualified accountant with membership of a recognised professional body, such as ICAEW, ACCA, CIMA, CIPFA or equivalent.	E	A / R
Evidence of continuing professional development and commitment to maintaining up-to-date professional knowledge.	E	A / I
Full UK driving licence and ability to travel regularly to Trust academies and other locations as required.	E	A / R

### Experience and Knowledge

Significant senior financial leadership experience in a complex organisation.	E	A / I
Strong experience of financial planning, budgeting, forecasting, management accounts, statutory accounts and financial reporting.	E	A / I / T
Strong understanding of financial governance, audit, internal control, risk management and compliance.	E	A / I / T
Experience of advising a CEO, Board, Trustees, Governors or senior leadership team on financial strategy, risk, performance and sustainability.	E	A / I
Experience of leading, developing and improving a finance team.	E	A / I
Experience of improving financial systems, processes, reporting or service delivery.	E	A / I

Experience of procurement, contract management, value for money or investment strategy.	E	A / I
Experience in a Multi-Academy Trust, education, charity, public sector or similarly regulated environment.	D	A / I
Knowledge of academy trust finance, including the Academy Trust Handbook, DfE returns, Academies Accounts Direction and relevant charity/company reporting requirements.	D	A / I
Experience of integrated curriculum and financial planning, pupil number modelling or school funding.	D	A / I
Experience of due diligence, organisational growth, school transfers, mergers or significant organisational change.	D	A / I

## Strategic Financial Leadership

Able to lead the Trust's financial strategy and align financial planning with organisational priorities.	E	A / I / T
Able to develop annual budgets, three-year plans, scenario models and financial forecasts based on realistic assumptions.	E	A / I / T
Able to interpret complex financial and operational information and turn it into clear advice, insight and recommendations.	E	I / T
Able to assess financial risk, sustainability, affordability and value for money.	E	I / T
Able to support strong financial control while also encouraging proportionate improvement, efficiency and innovation.	E	A / I
Able to understand and explain the financial implications of staffing, curriculum, estates, technology, procurement and growth decisions.	E	I / T
Strong understanding of finance systems, digital improvement and the potential for technology to improve efficiency, reporting and control.	E	A / I

## Leadership, Communication and Influence

Able to operate effectively as a senior member of the Executive Team.	E	A / I
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Able to contribute beyond finance to wider organisational strategy, risk, governance and improvement.	E	I
Able to advise, influence and constructively challenge the CEO, Trustees, Executive Team and academy leaders.	E	I / T
Able to communicate complex financial information clearly to non-financial colleagues.	E	I / T
Able to present effectively to Trustees, committees, senior leaders and other stakeholders.	E	I / T
Able to build effective relationships across a multi-site organisation.	E	A / I
Able to lead change in a thoughtful and credible way, bringing people with them rather than imposing change on them.	E	A / I
Able to lead, motivate and develop a finance team, setting clear expectations and supporting high performance.	E	A / I
Able to manage competing priorities, deadlines and unplanned demands calmly and effectively.	E	A / I
Able to work collaboratively with academy leaders, central teams, auditors, bankers, professional advisers and external agencies.	E	A / I

## Personal Qualities

High levels of integrity, openness and personal accountability.	E	A / I / R
Resilient, calm and determined, with the ability to work effectively under pressure.	E	A / I
Emotionally intelligent, empathetic and able to deal with people and situations sensitively.	E	I
Collaborative and service-minded, with a commitment to providing responsive and supportive finance leadership.	E	A / I
Curious, improvement-focused and open to learning.	E	I
Flexible and pragmatic, with the ability to respond to changing priorities.	E	A / I
Able to inspire confidence in Trustees, the CEO, Executive Team, academy leaders, finance colleagues and external stakeholders.	E	I

Politically and organisationally astute, able to understand context, relationships and sensitivities.	E	I
Committed to the Trust's ethos, values and moral purpose.	E	A / I

## Safeguarding, Equality and Safer Recruitment

Commitment to safeguarding and promoting the welfare of children and young people.	E	A / I / R
Understanding that all staff in an academy trust share responsibility for safeguarding, regardless of whether their role is teaching, operational or central services.	E	I
Ability to maintain appropriate professional boundaries when working in an education environment.	E	I / R
Commitment to equality, diversity and inclusion, and to treating others with dignity and respect.	E	A / I
Commitment to health and safety and to following Trust policies and procedures.	E	A / I
Willingness to comply with the Trust's safer recruitment and pre-employment checks, including an Enhanced DBS check and any other checks required for the post.	E	A / R

### Safeguarding Recruitment Statement

Applicants called for interview should note that the interview itself and any additional tasks will, where appropriate to the role, focus on the requirements of the job and explore issues relating to safeguarding and promoting the welfare of children.

This may include motivation to work in an education environment, ability to form and maintain appropriate professional relationships and boundaries, emotional resilience, use of authority, judgement and attitudes towards safeguarding.

South Pennine Academies is committed to safeguarding and promoting the welfare of children and young people. All workers, volunteers and employees are expected to share this commitment. All appointments are subject to satisfactory pre-employment checks, including satisfactory Enhanced DBS clearance and any other checks required for the post.

# HOW TO APPLY

Thank you for your interest in this appointment.

South Pennine Academies has retained KUDU Search to lead the search, engagement and early assessment process. KUDU Search is responsible for identifying, engaging and evaluating potential candidates before recommending individuals for inclusion in the Trust's formal recruitment process.

All initial contact and expressions of interest must be directed to KUDU Search.

## Don Aitken

KUDU Search

don@kudusearch.careers

<https://linkedin.com/in/donaitken>

0113 403 3346 | 07432 597 033



KUDU is holding exploratory conversations on a rolling basis. We encourage early engagement.

Initial discussions are informal and confidential, allowing both parties to explore the role, the context and potential fit.

KUDU will assess alignment against the agreed requirements of the opportunity. Candidates who are considered a strong fit will be invited to complete the Trust's formal application process.

All formal stages of the recruitment process, including longlisting, shortlisting, interviews and pre-employment checks, will be conducted by South Pennine Academies in line with its Safer Recruitment Policy. **Formal interviews with the Trust will be held during the week commencing Monday 22 June.**

Further information and supporting documentation can be found at: <https://kudusearch.careers/spa>





# SAFEGUARDING NOTICE

## Important Safeguarding notice/ Statement of Intent

As part of your wider duties and responsibilities you are required to promote and actively support the Trusts 'responsibilities towards safeguarding. Safeguarding is about keeping people safe and protecting people from harm, neglect, abuse and injury. It is about creating safe places, being vigilant and doing something about any concerns you might have. It isn't just about the very old and the very young, it is about everyone who may be vulnerable.

South Pennine Academies is committed to ensuring a culture of safer recruitment and as part of that implement recruitment procedures that deter, reject or identify people who might abuse children. All Academies across the Trust adopt a consistent and rigorous approach in the recruitment and selection processes, with the aim of ensuring that those recruited are suitable for such an important and responsible role. The purpose of safer recruitment is ultimately to:

- **Deter:** From the beginning of the recruitment process, it is important to send the right message – that the organisation has a rigorous recruitment process and does not tolerate any form of abuse. Wording in adverts and recruitment information must aim to deter potential abusers.
- **Identify and Reject:** It will not always be possible to deter potential abusers. Therefore, careful planning for the interview and selection stage, in terms of asking the right questions, setting appropriate tasks and obtaining the right information can assist in finding out who is suitable for the role and who is not.
- **Induct:** Induction is an essential part of our recruitment process, we ensure that comprehensive induction processes are in place, together with appropriate policies and procedures, raising awareness through staff training and generally developing and maintaining a safe culture within the organisation will all help to prevent abuse or identify potential abusers. Academy is committed to safeguarding and promoting the welfare of all students and staff must share this commitment. Appointment is subject to a satisfactory enhanced Disclosure & Barring service check and the Academy's Safer Recruitment policy and procedures. Please note two references will be taken up prior to the interview process, please ensure your referees are prepared and aware of your application.

The intention of this policy is to ensure that all stages of the recruitment process contain measures to deter, identify, prevent and reject unsuitable people from gaining access to pupils within the organisation. The policy and the practical implementation of recruitment and selection processes also aim to meet all legislative requirements, any statutory or other guidance that may from time to time be issued in order to keep children safe and safer recruitment in education, as well as principles of general good practice.

As part of our shortlisting process, in accordance with KCSIE Guidance, an online search will be completed on all shortlisted candidates.

## Equality

The Board of Trustees and school are committed to a policy of equality and aims to ensure that no employee, job applicant, pupil or other member of the school community is treated less favourable on grounds of sex, race, colour, ethnic or national origin, marital status, age, sexual orientation, disability or religious belief. Any behaviour, comments or attitudes that undermine or threaten an individual's self-esteem on these grounds will not be tolerated.

We aim to provide equal access to high quality educational opportunities and to ensure that everyone feels that they are a valued member of the school community. We seek to provide a safe and happy environment where all can flourish and where cultural diversity is celebrated.

## Disabled applicants

Disabled applicants are guaranteed an interview if they meet the essential requirements of the Personnel Specification. As an equal rights employer our school is committed to make any necessary reasonable adjustments to the selection process, the job role and the working environment that would enable access to employment opportunities for disabled people. Where a disabled applicant is being assessed the selection panel's decisions will be based on an assessment of that person's expected capabilities once reasonable adjustments have been made.

## Privacy notice

Our school aims to ensure that all personal data collected about staff, pupils, parents, governors, visitors and other individuals is collected, stored and processed in accordance with the General Data Protection Regulation (GDPR) (EU 2016/679) and the provisions of the Data Protection Act 2018 (DPA 2018). This policy applies to all personal data, regardless of whether it is in paper or electronic format. For further information please see the full privacy policy on our school website.



**South  
Pennine  
Academies**

An excellent education for everyone

The Gateway,  
Lowfield's Business Park, Lowfield's Close, Elland, HX5 9DX  
Telephone: 01484 503110, Email: [office@spacademies.org](mailto:office@spacademies.org)  
Website: [www.southpennineacademies.org](http://www.southpennineacademies.org)



## PARTNERS OF SOUTH PENNINE ACADEMIES

**SOUTH PENNINE ACADEMIES IS A CHARITABLE MULTI ACADEMY TRUST ESTABLISHED IN 2012. WE CURRENTLY WORK WITH ELEVEN PRIMARY AND SECONDARY CONVERTER AND SPONSORED ACADEMIES LOCATED IN CALDERDALE, KIRKLEES AND OLDHAM. THE TRUST ALSO OPERATES HUDDERSFIELD HORIZON SCITT.**

The team at South Pennine Academies are committed to delivering school improvement through the development of effective partnerships with our academies, the communities we serve and external organisations. Our academies are an integral part of their local communities. We value the diversity and distinctive opportunities that working within our local communities brings. Development of local solutions to meet local needs is a key aspect of our work.

### BENEFITS OF JOINING THE TRUST:

- **Professional Development** - The Trust is committed to developing all staff within their roles and creating continued fantastic opportunities for further career progression.
- **Pension** - Every employee of South Pennine Academies has access to the Teachers' Pension Scheme or the Local Government Pension Scheme.
- **Wellbeing Benefits** - Through our wellbeing provider, Smart Clinic, staff can access a number of generous wellbeing benefits including physiotherapy, cancer support, stress counselling support and weight management.
- **Free Will writing service** - Provided via solicitors Dunham McCarthy - a free and completely confidential service for all SPA employees. The free service is provided remotely, either by telephone or video call, at a time to suit you. You will have an adviser to help you complete each step from start to finish.
- **Free eye test vouchers** - All employees can request a Specsavers voucher from the Trust. This gives them a free eye test and up to £49 off glasses for VDU purposes only.
- **Annual Flu Vaccinations** - Annual Flu vaccinations offered to staff either by visit from nurse on site or via vouchers, accepted at various GP surgeries or pharmacies.
- **Flexible Days** - Our Trust gives all staff up to 2 days paid time off during term time for life events.

# OUR ACADEMY PARTNERS & SCITT

