



**SOUTH CUMBRIA**  
MULTI-ACADEMY TRUST

# CANDIDATE INFORMATION PACK

**CHIEF  
OPERATING  
OFFICER**

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# Welcome to our Trust

## About us

South Cumbria Multi-Academy Trust began in 2021 with education at its heart and a real focus on pupils achieving their full potential and gaining valuable academic and life skills. It is based from Chetwynde School in Barrow-in-Furness.

## Our schools

We have six schools in our Trust and a further two with academy orders. Our schools are: Chetwynde, Ormsgill, Vickerstown, South Walney Juniors, Cambridge Primary and Newbarns Primary and Nursery School. Two more schools have academy orders to join us.

## Our vision

Inspiring young people and changing lives through excellence in education in South Cumbria  
Our values inform everything we do and can be seen below.



**Excellence**

in everything we do



**Respect**

for individuals, enabling equality, diversity and inclusivity



**Innovation**

in how we work, develop and continuously improve



**Celebration**

of the success and achievement of our pupils and staff



**Ambition**

for the Trust and its pupils to be the best they can



**Support**

for pupils and staff by providing care and promoting well-being and resilience in a safe and protective environment

# Executive Summary

Dear Prospective Applicant,

Thank you for your interest in South Cumbria Multi-Academy Trust. We are pleased to welcome you to the application process for the post of Chief Operating Officer.

We hope the information included in the pack provides you with a good insight into our transformational trust, the significant role we play within South Cumbria and our aspirations for the future. Located in the vibrant community of Barrow-in-Furness, our trust sits in a region enriched with culture, historical landmarks, and the breathtaking landscapes of the Lake District on our doorstep. South Cumbria is a thriving place to live and work.

South Cumbria Multi-Academy Trust was founded in 2021 with a clear mission to enhance educational standards and broaden the life opportunities for children in our community. Drawing from its passion for education and community involvement, the Trust has grown to include six schools, each upholding values of excellence, respect, innovation, celebration, ambition and support.

Our aim is relentlessly focused on inspiring and cultivating young minds, ensuring every pupil achieves their maximum potential. This resolve is clear in our vision, which commits to inspire young people and change lives through excellence in education in South Cumbria.

The Trust schools each maintain unique identities yet come together with shared goals aimed at fostering educational success and the wider development of our pupils. We pride ourselves on our innovative approaches to learning, emphasis on mental well-being, and readiness to embrace technological advancements to benefit our pupils and staff.

Looking forward, our ambition is to not only sustain this momentum but welcome more schools into our Trust family – we currently have a further two schools with academy orders which will be joining us in due course.

For our future Chief Operating Officer, we offer more than just a role. This is an opportunity to steer impactful projects, shape educational policies, and witness your hard work making a difference to our children and their families. The Trust promotes a welcoming, friendly and supportive environment in which to work and we actively promote opportunities for professional development and personal growth within our team of dedicated staff.

Together with the Chair of the Board, we welcome applications from the broadest range of successful and suitably experienced individuals and we hope that the selection process will provide you with the opportunity to share your insights and vision, which will be crucial in driving our objectives towards even greater achievements.

Thank you for considering a leadership role within South Cumbria Multi-Academy Trust. We look forward to hearing from you.



Professor Andrew Wren  
Chief Executive Officer



Phil Huck  
Chair of the Board of Trustees

# JOB PROFILE

**POST TITLE:** CHIEF OPERATING OFFICER

**RESPONSIBLE TO:** Chief Executive Officer

## PURPOSE

As a member of the Trust's Senior Leadership Team, the Chief Operating Officer (COO) will provide strategic finance and business advice and is responsible for financial management of the Trust and all non-academic central service operations. The COO will also act as the Trust's designated CFO (Academies Handbook 1.39-1. And 41) is accountable for the accuracy and resilience of the Trust accounting practice, systems and data and is directly responsible for providing the required levels of competence and ownership of the financial operation of the Trust. The COO will work with the CEO and the wider SLT on shaping and delivering the Organisation's objectives, driving a culture of continuous improvement in all support areas, and leading a successful and growing organisation.

**HOURS:** 1 FTE - 37 hours per week, full year.

**SALARY SCALE:** Westmorland & Furness/Cumberland County Council  
Grade – OS18 (£63,830 -£66,642 for 2024-2025)

## Core duties and responsibilities

As a key member of the Trust's senior leadership team, the COO is expected to bring a modern, business-like approach to the Trust, proving a highly competent and efficient service with an emphasis on business partnership across the Trust.

The appointee will develop and deliver a proactive, customer focused service. The Trust is expected to continue to grow and the post-holder must have the ability to forecast an efficient and robust operating model for the Trust in this period as well as leading on the appointment of either internal resources or external service contracts to ensure that all financial and non-academic support provided to the current schools and potential joining schools meets end-user demands at all times.

## Strategic

- To provide sound strategic advice to the CEO, Trustees and Head Teachers on all financial and central service matters relating to the Trust.
- To prepare the Trust's annual financial forecasts, forecasts for corporate strategies, statutory accounts, financial returns and reports to Trustees, ESFA/DfE and other statutory bodies in accordance with guidance and externally determined deadlines.
- To be responsible and accountable for the delivery of financial support services throughout the Trust, including the management of Trust's accounting system and internal controls.
- To lead the promotion and delivery of sound financial management throughout the organisation, in line with the Academies Handbook.
- To lead to provision of all non-academic, central services to member schools, and to develop these to meet the needs of all stakeholders.
- To provide leadership and direction to the Trust's Financial Controller and Operations Manager
- To keep abreast of financial developments across the education sector by liaising with senior finance staff in other trusts, the DfE and other relevant organisations.



# JOB PROFILE

## Financial Leadership

- To provide the financial lead to the strategic planning process of the Trust e.g. annual budgets, periodic forecasts and funding requirements
- To oversee and prepare the annual Trust budgets, working closely with Head Teachers to ensure consistency with the Trust's strategic and financial objectives and associated reports and returns as required in line with the Trusts financial calendar
- Develop and maintaining financial systems to ensure:
  - DfE and all appropriate returns are met
  - Pension records and returns are up to date
  - Effective management of payroll and that all tax and National Insurance records and returns are up to date
  - Income collection procedures are operating effectively and debt is minimised
  - Invoices are processed efficiently
- Monitoring the income and expenditure budgets across the trust working closely with the Head Teachers
- Providing accurate and timely information to enable effective budgetary control, decision-making and sound strategic planning
- To ensure the Trust complies with its obligations in accordance with the funding agreement, the Academies Handbook and the Trust's financial regulations and procedures.
- To advise and support the CEO in the financial aspects of their responsibilities in her/his capacity as Accounting Officer.
- To ensure that the Trust follows best practice in terms of financial governance, and ensure the probity, and legislative compliance, of all financial transactions, including payroll and cash handling, and the integrity and suitability of all control mechanisms (audit and risk management).
- To liaise with both internal and external auditors to enable them to operate effectively, including preparation for year-end overseeing academies accounts
- To manage the cash position of the Trust and its operating activities, reporting regularly on this aspect of financial management to the Trustees.
- To ensure that the Trust achieve value for money across all their activities, including the delivery of services
- To manage the Trusts contracts with external suppliers including the main finance system and outsourced payroll provider
- To provide financial management reports to the Board of Trustees, the Finance and Risk Assurance Committee, and to the DfE

## Estates Management, Health and Safety, IT, and Data Services

- To lead and support the Trust's Operation Manager and her/his wider team:
  - To support and develop strategies for premises management to ensure that the quality of the estate and the learning environment for pupils is improved, sustainable and maintained
  - To ensure the effective implementation of Health and Safety requirements across the Trust and compliance with Health and Safety law; reporting where required to Trustees
  - To maintain a business continuity plan for SCMAT and its schools, with detailed operational plans
  - To ensure the development and maintenance of appropriate IT infrastructure and systems to support the objectives and aims of SCMAT
  - To ensure the development and maintenance of operational systems to support the aims of SCMAT



# JOB PROFILE

## **Procurement, Project, and Contract Management Role**

- To lead and support the Trust's Operation Manager and her/his wider team:
  - To ensure best value and compliance with all private-sector legislation and regulatory requirements, the acquisition of supplies and services through effective procurement and tendering, monitoring the operation of policies concerning procurement and ordering
  - To provide project management expertise and advice to the Central team and schools
  - To investigate, source, and maximise income (revenue and capital), liaising with funding agencies and government, amongst others, and write bids

## **Human Resources**

- To lead and support the Trust's Operation Manager:
  - To oversee the recruitment and retention of staff, managing employee performance, ensuring compliance with education sector HR regulations
  - To develop and implement HR policies, facilitating staff development, and collaborating with school leaders on workforce needs, while aligning with the Trust's strategic goals and maintaining a positive working environment for teachers and other staff

## **General Responsibilities**

- To contribute to and uphold the overall vision and ethos of South Cumbria Multi Academy Trust.
- Attending meetings within the Trust/ academies and external events as required.
- To recognise own strengths and areas of expertise and use these to inspire, advise and support others.
- To promote team work, working in partnership to ensure effective working relations.
- To be aware and comply with equal opportunities and all Trust policies at all times.
- To assist with the development of policies and procedures as may be required outside own remit of role.
- To produce, and respond to, complex correspondence from stakeholders and external agencies.
- To participate in training and other learning activities and performance development as required.
- To maintain confidentiality at all times in respect of Trust-related matters and to prevent disclosure of confidential and sensitive information.
- To comply with all of the Trust's safeguarding requirements.
- To undertake other duties commensurate with the senior nature of the post as directed by the CEO and the Board. The duties and responsibilities highlighted in this job specification are indicative and may vary over time. Postholders are expected to undertake other duties and responsibilities relevant to the nature, level and scope of the post and the grade has been established on this basis.



## POST: CHIEF OPERATING OFFICER

QUALIFICATIONS AND TRAINING	ESSENTIAL (E) DESIRABLE (D)	HOW IDENTIFIED
Full professional accountancy qualification from a recognised professional body i.e. CCAB, ICAEW, ACCA, CIMA or CIPFA or have extensive experience of acting in a Chief Operating Officer or Finance Director capacity.	E	A
Educated to degree level or equivalent	E	A
Evidence of continuing professional development	E	A
Higher degree	D	A
Professional qualification such as leadership and management, HR, procurement, project management or health and safety	D	A
KNOWLEDGE AND EXPERIENCE	ESSENTIAL (E) DESIRABLE (D)	HOW IDENTIFIED
Senior financial management and strategic leadership either in the public or private sector with accountability for a complex resource base	E	A/R/S
Proven track record of successful financial leadership and building effective teams	E	A/R/S
Significant experience of leading and managing budgets, and working with stakeholders to develop strong financial understanding and empathy across the organisation	E	A/R/S
Experience of developing and managing external relationships with professional and regulatory bodies	E	A/S
Evidence of innovation, with an ability to identify commercial opportunities to maximise income	E	A/S
Leadership of a high-performing team	E	A/S
Detailed and up to date knowledge of accountancy and professional codes of practice	E	A/S
Advanced knowledge of statutory requirements and funding strategies.	E	A/S
Substantial knowledge and experience of managing procurement and contracts	E	A/S
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Experience of leading human resources, estates, IT, procurement and wider contracts in a successful organisation	E	A/S
High level of IT competence, including spreadsheets and experience of and supporting others in the use of financial software packages	E	A/S
Experience of working within an educational setting	D	A/S
Experience of working with Governors, Trustees, or similar	D	A/S
Experience in obtaining additional funding	D	A/S
Up to date knowledge of Data Protection and Freedom of Information Acts	D	A/S
An understanding/ experience of working with external auditors and agencies	D	A/S
<b>SKILLS AND ABILITIES</b>	<b>ESSENTIAL (E) DESIRABLE (D)</b>	<b>HOW IDENTIFIED</b>
Possesses excellent communication, organisational and interpersonal skills	E	A/R/S
Able to establish and maintain positive relationships (staff, agencies, external/internal etc.)	E	A/R/S
Excellent written and proof-reading skills	E	A/S
Decisive	E	S
Proven ability to work in a fast-paced environment	E	A/R/S
Ability to think strategically and deliver operationally	E	A/R/S
<b>CHARACTERISTICS</b>	<b>ESSENTIAL (E) DESIRABLE (D)</b>	<b>HOW IDENTIFIED</b>
Self-motivated and hard working	E	S
Sense of humour and optimism	E	S
Willingness to be flexible and work to meet the best interest of the Trust	E	R/S
Open, honest and approachable	E	R/S
Innovative and creative	E	S
Able to support, guide, challenge and influence their key peer group	E	S