



Application Pack

Finance Assistant



Job Title	Finance Assistant
Salary & Grade	G4 SCP 5-6 £25,583 - £25,989
Contract	Permanent, Full time, 37 hours per week.
Reporting to	Head of Finance
Start Date	ASAP

Dear Applicant

Thank you for your interest in the role of Finance Assistant at Waterton Academy Trust.

We are looking for an organised, accurate and customer-focused colleague to join our friendly central finance team. The team supports our academies and central services across Wakefield and Barnsley, helping to ensure that public funds are managed carefully and used to achieve the best possible outcomes for children and young people.

As Finance Assistant, you will play an important role in the day-to-day running of the finance service. Your work will include processing purchase and sales invoices, maintaining supplier information, preparing payment runs, posting journals, resolving queries and helping to ensure that our financial records are complete, accurate and up to date. You will work with colleagues across the Trust, so attention to detail, clear communication and a helpful, professional approach will be essential.

This is an excellent opportunity for someone looking to build on existing financial or administrative experience and develop a career in finance. You will be supported by experienced colleagues and will gain exposure to a broad range of financial processes, systems and schools. As the Trust and its finance service continue to grow, there will be opportunities to develop your knowledge, skills and experience further.

Waterton Academy Trust is a growing, values-led organisation encompassing early years, primary and specialist provision. We are proud of our collaborative culture and believe that effective financial administration makes an important contribution to the success of every academy and every pupil.

The role will be based at our Cudworth office and may involve occasional travel to academies across the Trust.

If you share our values and are committed to providing an accurate, responsive and professional service, we would be delighted to hear from you.

We look forward to receiving your application.

About Us

Waterton Academy Trust is a thriving and values-led partnership of schools committed to giving every child the best possible start in life.

Established in 2014 with Walton Primary Academy as its founding member, the Trust has grown steadily and strategically, guided by a strong moral purpose and a deep understanding of the communities we serve. We

believe that **success is a shared experience** — every learner, every member of staff, and every school should flourish, together.

By the end of 2026, we expect to support more than 4,000 pupils across our schools, with a dedicated team of over 600 staff and an annual turnover approaching £28 million.

Our growth has not been about size alone - it reflects the strength of our educational offer, the diversity of our provision, and the depth of our partnerships.

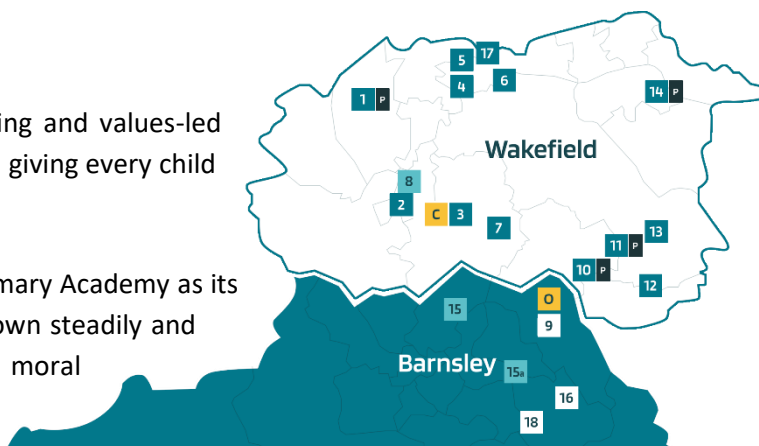
We work across two key regions - Wakefield and Barnsley - and are proud to be seen as a trusted and collaborative presence within the wider education system. All our schools are primary-phase, and collaboration sits at the heart of how we work.

In response to local need, our first independent special academy—Newstead Academy opened in Barnsley in 2023 and has already grown to include a satellite site based at Hunningley. Building on this success, we have opened a new specialist setting - Hammer Lane Academy - in Wakefield in September 2025. These developments are a testament to our commitment to inclusive education and our ability to work alongside local partners to meet the needs of all learners.



We also know that a great start in education begins early. That's why we've expanded our offer to include four pre-school settings, with plans for further growth.

If you share our belief that all children deserve the highest-quality education and want to be part of a forward-thinking, people-centred organisation, we'd love to hear from you.



Our Locations

Waterton Offices

C - Centre for Excellence
O - Operations Office

Waterton Schools

- 1 - Wrenthorpe Academy
- 1p - Wrenthorpe Pre-School
- 2 - Sharlston Community School
- 3 - Walton Primary Academy
- 4 - Normanton Junior Academy
- 5 - Lee Brigg Infant and Nursery School
- 6 - Normanton Common Primary Academy
- 7 - Crofton Infant's School
- 8 - Hammer Lane Academy
- 9 - Churchfield Primary School
- 10 - King's Meadow Academy
- 10p - The Meadow Pre-School
- 11 - West End Academy
- 11p - The Woodland Pre-School
- 12 - South Kirkby Academy
- 13 - Ackworth Mill Dam School
- 14 - Cherry Tree Academy
- 14p - Cherry Blossom Pre-School
- 15 - Newstead Academy
- 15a - Hunningley Academy
- 16 - Kings Oak Primary
- 17 - Allotts Junior Academy
- 18 - Jump Primary Academy

Our Vision and Values

The Trust is proud of its shared vision and values, which are embedded across all aspects of our work.

This vision—centred on collaboration, aspiration, enjoyment, and equity—guides our actions and unites our schools in a common purpose. We aim to create a culture where success is a shared experience, every child enjoys a rich and relevant curriculum, and all pupils are supported to achieve their full potential, regardless of background.

Candidates interested in joining the Trust are encouraged to explore our vision and values to ensure they align with their own ethos and long-term aspirations.



More Information

The Finance team forms part of Waterton Academy Trust's central services function and provides financial support to academies and central teams across Wakefield and Barnsley. Its purpose is to safeguard public funds through accurate financial processing, effective controls, clear procedures and a responsive service to colleagues and suppliers.

The team supports the full financial cycle, from purchasing, invoicing and payments through to ledger maintenance, financial reporting, budget support, audit and compliance. It works closely with school leaders, budget holders and central-service colleagues to ensure that financial information is accurate, timely and easy to understand.

Waterton continues to grow across early years, primary and specialist provision. The finance service is therefore developing consistent systems and processes that support sustainable growth, strengthen financial controls and enable school leaders to focus on delivering excellent teaching and learning.

The Finance Assistant is central to the effective operation of this service. By completing transactions accurately, resolving queries promptly and maintaining reliable financial records, the postholder will help ensure that resources are managed well and used for the benefit of children across the Trust.

Joining the team will provide broad experience of academy-trust finance, support from experienced colleagues and the opportunity to develop within a collaborative, values-led organisation.

Our Pupils

Waterton Academy Trust serves communities with some of the highest levels of deprivation in the region, and in the country. In response, we place children's well-being, voice, and enrichment at the very heart of our work. We believe that every pupil, regardless of background, should feel the full benefit of belonging to a trust that puts their experience of school first.

Pupil voice is not just encouraged - it's embedded in our decision-making. Our elected Children's Parliament meets regularly with the CEO and Headteachers, sharing their views and shaping priorities for improvement. Their efforts were recognised nationally, receiving a letter of commendation from former Prime Minister Theresa May.

Beyond the classroom, we create rich and joyful experiences that promote creativity, confidence, and healthy living. Our roaming art gallery, Waterton's Got Talent, and Waterton Young Chef of the Year celebrate the diverse talents of our pupils, while our annual MATlympics and extensive sports offer promote inclusion, teamwork, and well-being.

These experiences are not just events; they are integral to our mission—ensuring that every child in a Waterton school is heard, celebrated, and empowered to thrive.

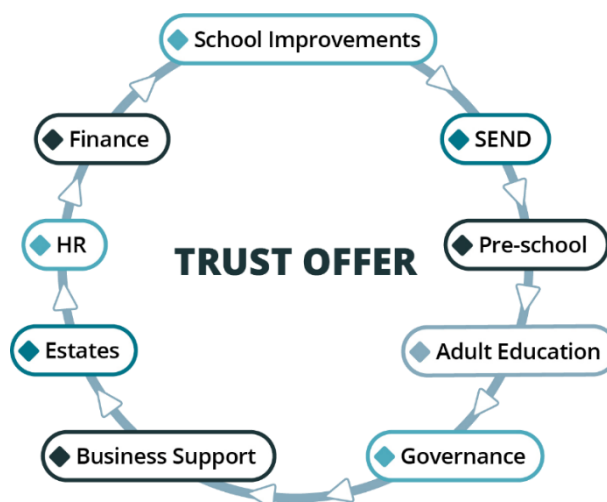


Trust Offer

At Waterton Academy Trust, we are proud to provide a consistent, high-quality offer that enables every school - regardless of size, Ofsted rating, or context - to thrive. Our Trust Offer ensures that all academies benefit from the same comprehensive package of educational and operational support, tailored to meet individual school needs while remaining accessible to all.

This offer is underpinned by our belief that school leaders should be able to focus their time and energy on what matters most: delivering excellent teaching and learning. By reducing operational burdens and providing high-quality, evidence-informed school improvement support, we create the conditions in which pupils and staff can flourish.

Our investment in a strong and expert central team means that every school can draw upon specialist support in areas such as safeguarding, governance, curriculum, finance, HR, IT, estates, marketing, and data protection. This support is complemented by access to legal advice and professional development, including high-impact CPD, leadership development, and coaching.



The Trust Offer is more than a service package - it's a reflection of our values. It supports excellence, equity, and collaboration across all Waterton schools, enabling leaders to deliver the very best for their pupils, every day.

To read about impact in 2025, please read our annual report to stakeholders on the Trust website.

<https://www.watertonacademytrust.org/academies/trust-performance/>

Job Description – Finance Assistant

Job Title	Finance Assistant
Reporting to	Chief Financial Officer
Grade	G4 SCP 5-6

Main Purpose	Under the instruction/guidance of senior staff, support the Central Finance team in undertaking transactional processing and maintenance of the Trust financial ledgers. This person must be able to work independently and take responsibility for their own workload. The post will involve working on site at the central finance office with occasional travel across the Trust.
Key Responsibilities	The post holder will provide range of financial support services including the transactional processing for academies across the Trust and the Central Support Team. Duties will include: • Use of the trust's financial management systems to undertake all financial administration tasks • Support the placing of orders, including the review and update of supplier records/information • Processing large volumes of invoices, ensuring expenditure is correctly allocated • Dealing with supplier queries • Investigating discrepancies between orders and invoiced amounts • Preparation of BACs runs • Dealing with staff within academies across the Trust • Raising sales invoices • Processing journals • Working on ad hoc finance review exercises • Undertake any financial administration tasks, commensurate with the grade as part of a flexible team.
Expectations of All Employees	• Represent and promote Waterton Academy Trust values internally and externally • Ensure that all stakeholders receive an excellent customer service experience in all dealings with you and with Waterton Academy Trust • Deliver your day-to-day duties consistently with the agreed service level • Actively promote and act, at all times, in accordance with Trust policies, e.g. Code of Conduct, Health and Safety, Equal Opportunities and Safeguarding • Make a commitment and contribution to the overall ethos and values of the trust, upholding these in all activities connected with the role • Undertake other duties commensurate with the job level • Promote high standards of personal professional conduct in accordance with the Trust Employee Code of Conduct
Additional Information	The duties and responsibilities highlighted in this Job Specification are indicative and may vary over time. Post holders 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.
Working Conditions	The role is office based, but we offer hybrid and flexible working policies. At times, staff may be required to visit the academies within the Trust.
Characteristics of the Post	Employees are encouraged to participate in training activities in order to enhance their own personal development. The employment checks are required: • Evidence of entitlement to work in the U.K. • Evidence of essential qualifications – see job specification • Two satisfactory references • Confirmation of medical fitness for employment • Registration with appropriate bodies (where applicable) The following employment checks are required for those positions which are based in a school or working with vulnerable young people and adults: Evidence of a satisfactory safeguarding check e.g. DBS check at the relevant level.
Customers and Clients	Implementing regulations and providing advice and guidance on established internal policies and procedures which may involve some interpretation to meet specific circumstances within school.

Person Specification – Finance Assistant

AF: Application Form

OT: Occupational Task

CQ: Certificates/Qualifications

I: Presentation

I: Interview

R: Reference

Qualifications	Essential	Desirable	Assessed
5 GCSE passes including English and Maths (Grade C or above) or equivalent level 2 qualifications	X		AF/CQ
Studying towards Association of Accounting Technicians (or equivalent)		X	AF/CQ
Experience	Essential	Desirable	Assessed
Experience in finance/office administration		X	AF
Experience in providing excellent customer service	X		AF/I
Experience of maintaining an accounts system and processing day to day transactions	X		AF/I
Working knowledge of Education accounting package		X	AF/I
Understanding of relevant policies, procedures and codes of practice		X	AF/I
Skills	Essential	Desirable	Assessed
Excellent written and oral communication skills	X		AF/I/OT
Ability to work as a team member, but independantly at times, working with minimum supervision	X		I/R
Rigouous and methodical with the ability to manage own workload and meet deadlines. Ability to multi-task is essential as is the ability to prioritise and effectively manage large volumes of transactions	X		I/R
Work generally within set procedures and guidelines, occasional use of creativity in the solving of routine problems	X		I/R
Structured and well organised	X		I/R
A professional, friendly and respectful approach which demonstrates support and shows mutual respect	X		I/R
Personal Attributes	Essential	Desirable	Assessed
Willing to work flexibly in accordance with policies and procedures to meet the operational needs of the Trust	X		I/R
Operate with the highest standards of personal/professional conduct and integrity	X		I/R
Committed to professional development in connection with the post	X		I/R
Work in accordance with the Trust's core values and behaviours	X		I/R
Travel in connection with the post	X		I/R
A commitment to equality/diversity in the workplace and the wider educational community	X		I/R
A commitment to safeguarding and promoting welfare for all	X		I/R

Suitability to work with children and young people	Essential	Desirable	Assessed
Satisfactory DBS disclosure and standard Trust pre-secondment checks	X		AF, R, I
Ability to work in a way that promotes the safety and well-being of learners	X		AF, R, I

Next Steps

For further information about the opportunity please contact admin@watertonacademytrust.org for a confidential conversation.

To Apply

Please submit applications via My New Term.

Selection Timeline

Closing Date: Monday 10th August 2026- midday

Shortlisting: Tuesday 11th August 2026

Interviews: TBC

Start Date: ASAP

Waterton Academy Trust is wholly committed to ensuring children and young people are fully supported and safe. We are dedicated to the safeguarding of all children and young people whilst promoting their welfare and expect all staff and volunteers to share this responsibility. An enhanced DBS check is required for the successful candidate, this process is completed by an online third party company. The position is also subject to two satisfactory references. Shortlisted candidates will be asked to provide details of any unspent convictions and those that would not be filtered, prior to the date of interview. We are committed to treating all applicants fairly and have a policy on the recruitment of ex-offenders which is available to applicants on request. Waterton Academy Trust is wholly committed in ensuring that all employees, future employees and applicants are treated equally regardless of age, disability, gender reassignment, marriage and civil partnership, maternity, race, religion and belief, sex and sexual orientation.

It is an offence to apply for the role if the applicant is barred from engaging in regulated activity relevant to children.