



Watererton
Academy Trust

Application Pack

Head of Finance



Job Title	Head of Finance
Salary & Grade	Leadership Scale B1 to B4 £56,601 to £60,617 (pending confirmation of pay award)
Contract	Full Time, All Year Round
Reporting to	Chief Financial Officer
Start Date	As soon as possible

Dear Applicant

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

We are delighted to share this opportunity with individuals who are passionate about strong financial stewardship, effective systems and controls, and ensuring that every pound of public funding supports the best possible outcomes for our children and young people.

Waterton Academy Trust is a dynamic and growing multi-academy trust, comprising primary, early years and specialist settings across Wakefield and Barnsley. We are proud of our strong culture of collaboration, integrity and ambition for all learners.

As a publicly funded organisation, we recognise our responsibility to safeguard public funds, maintain robust financial controls and provide high-quality financial leadership across all academies. This role is central to ensuring that our finance function continues to run smoothly, efficiently and effectively as the Trust grows.

The Head of Finance will work alongside the Chief Financial Officer to provide strategic and operational leadership of the Trust finance function. The postholder will lead and support the central finance team, prepare and review management accounts, support budget planning and forecasting, strengthen financial reporting, and provide expert advice and guidance to school and Trust leaders.

A key aspect of the role will be helping to shape the next stage of our finance service. This includes developing fit-for-purpose systems and controls, improving consistency across academies, supporting the use of financial modelling and scenario planning, and ensuring that leaders have clear, timely and user-friendly financial information to support decision-making.

The role combines strategic influence with hands-on operational delivery. It requires strong technical finance capability, attention to detail, the confidence to provide constructive challenge and the ability to build effective relationships with colleagues across the central team, academies, auditors and external partners.

As Waterton continues to grow, there is genuine scope for this role to develop further in influence, breadth and impact. For the right candidate, this is an opportunity to deepen senior leadership experience, deputise for the CFO when required, contribute to Trust-wide financial strategy and play a significant role in shaping a finance function that is resilient, responsive and ready for future growth.

If you are committed to strong governance, collaborative working, continuous improvement and achieving the best possible use of public funds, we would be delighted to hear from you.

We look forward to receiving your application.

Waterton Academy Trust, Centre For Excellence, Walton Primary Academy, The Grove, Wakefield, WF2 6LD

 01924 240767  admin@watertonacademytrust.org  watertonacademytrust.org

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.

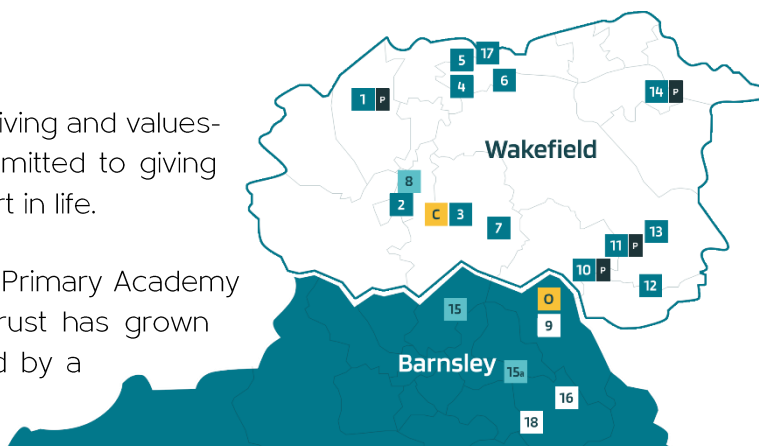
We work across two key regions - Wakefield and Barnsley - and are proud to be seen as a trusted and collaborative presence within the wider education system. All our schools are primary-phase, and collaboration sits at the heart of how we work. Our Trust continues to grow, with King's Oak Primary joining us in September 2025, and two other schools in the pipeline for growth.

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 are preparing to open 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

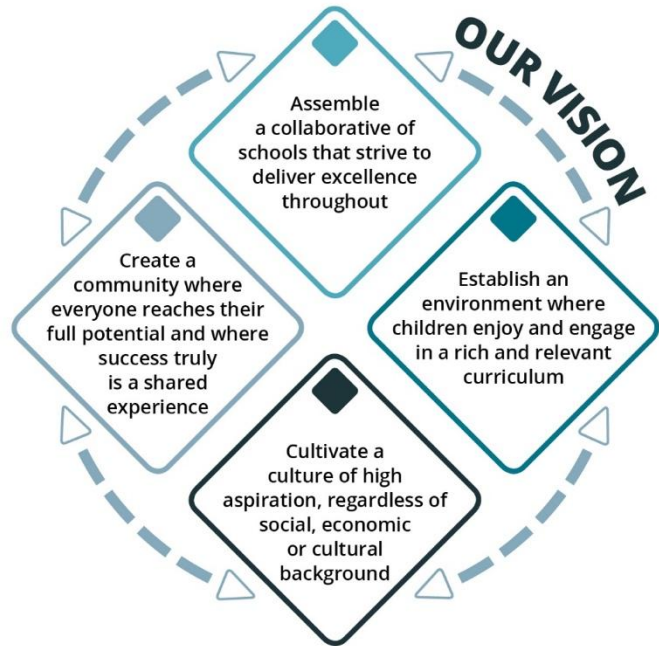
- 1 - Wrenthorpe Academy
- 1p - Wrenthorpe Pre-School
- 2 - Sharlston Community School
- 3 - Walton Primary Academy
- 4 - Normanton Junior Academy
- 5 - Lee Brigg Infant and Nursery School
- 6 - Normanton Common Primary Academy
- 7 - Crofton Infant's School
- 8 - Hammer Lane Academy
- 9 - Churchfield 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 - Alfton 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

Over the past decade, Waterton Academy Trust has evolved into a resilient, values-led and high-performing organisation, expanding not only in scale but in the depth, diversity and sustainability of our provision. Since our establishment in 2014, we have grown with clear moral purpose and strategic intent, building a strong reputation across Barnsley and Wakefield as a trusted partner that secures sustainable school improvement.

Today, Waterton specialises in high-quality early years, primary and specialist education. Our growth has been carefully managed and values-led, ensuring collaboration, financial stability and educational integrity remain central to our model. Schools work in close partnership, sharing expertise, accessing targeted professional development and drawing on collective capacity to solve challenges effectively.

At the heart of Waterton is a belief that success should be a shared experience, for every pupil, every colleague and every school. Our ambition is to create the conditions in which children thrive academically, personally and socially, while also ensuring that staff are well-supported, valued and able to develop throughout their careers.

This commitment is reflected in our Trust Offer, which provides every academy with access to high-quality educational and operational support. Through our central team and specialist partners, schools benefit from expertise across finance, HR, estates, governance, business support, IT, SEND, pre-school provision and school improvement. This approach enables school leaders to focus on their core purpose: delivering excellent teaching and learning, grounded in evidence-informed practice.

Strong financial and operational leadership underpins this work. Through careful stewardship, effective collaboration between the central team and school leaders, and a prudent approach to long-term planning, Waterton has maintained a strong and stable financial position. This enables the Trust to invest meaningfully in education, school environments, infrastructure, digital transformation, pupil wellbeing and the wider development of our workforce.

The Head of Finance will join the Trust at an important stage in its development. As Waterton continues to grow, including the expansion of specialist provision and the onboarding of new schools, the finance function will play a central role in supporting sustainable growth, strengthening systems and controls, improving financial insight and ensuring that public funds are used effectively to maximise impact for children.

Our strategic priorities are framed around five key pillars: high-quality education, school improvement, skilled workforce, finance and operations, and governance and leadership. Within this framework, finance and operations are central to ensuring that resources are allocated well, risks are managed effectively, procurement delivers value, and data and systems support informed decision-making across the Trust.

This role therefore offers more than operational financial management. It is an opportunity to contribute to the strategic development of a growing multi-academy trust, shape the future of finance service delivery, support schools through change and growth, and work alongside leaders who are ambitious for both pupils and staff.

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.

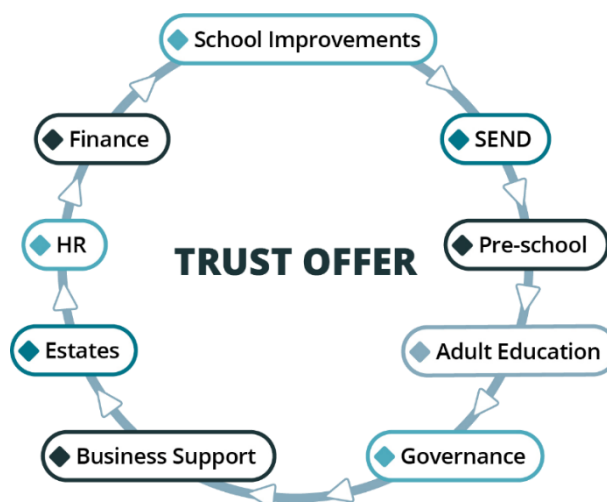


Trust Offer

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 2024, please read our annual report to stakeholders on the Trust website.

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

Job Description – Head of Finance

Job Title	Head of Finance
Reporting to	Chief Financial Officer
Grade	Leadership Grade B1 to B4 £56,601 to £60,617 (pending confirmation of pay award)

Main Purpose	<p>The Head of Finance will provide high-quality leadership and operational management of the Trust's finance function, ensuring that robust financial controls, systems and reporting arrangements are in place across the organisation.</p> <p>Working closely with the Chief Financial Officer, the postholder will play a key role in strengthening financial stewardship, supporting strategic decision-making, and ensuring that public funds are safeguarded and used effectively to support the Trust's educational mission.</p> <p>The role will lead the delivery of consistent, centralised finance processes across the Trust, providing clear financial insight, challenge and support to school leaders, budget holders, the Executive Team and Trustees. The postholder will support medium and long-term financial planning, budget setting, forecasting, audit, compliance and continuous improvement.</p> <p>As the Trust continues to grow and develop, the Head of Finance will contribute to the further development of finance systems, controls, reporting and service delivery. The role offers significant opportunity to shape finance practice across the Trust, support the onboarding of new schools, and develop wider strategic influence within a growing and values-led organisation.</p>
Key Responsibilities	<p>Strategic Financial Leadership</p> <ul style="list-style-type: none"> • Support the CFO in delivering a high-performing finance function that enables effective financial planning, decision-making and accountability across the Trust. • Lead the development, maintenance and review of academy and Trust-wide budgets, ensuring alignment with school improvement priorities, asset planning, staffing structures and the Trust's strategic objectives. • Lead on budget setting, forecasting and in-year financial monitoring across schools, providing clear analysis of financial performance, risks and emerging pressures. • Undertake financial modelling and scenario planning to support strategic decision-making, growth planning and sustainability. • Provide timely, accurate and insightful financial information to the CFO, Executive Team, Trustees, Headteachers and budget holders. • Keep abreast of financial changes, funding guidance and sector developments, advising the CFO and senior leaders on implications for the Trust. <p>Financial Management, Reporting and Controls</p> <ul style="list-style-type: none"> • Lead the monthly management accounts process, ensuring accurate, timely and meaningful reporting across the Trust.

	<ul style="list-style-type: none"> • Oversee the monthly period closedown process, including reconciliations, trial balance review, management accounts preparation and supporting analysis. • Lead year-end finance procedures, including accruals, prepayments, fund analysis and preparation of evidence for audit. • Ensure that financial records are maintained accurately, consistently and in accordance with the Academy Trust Handbook, accounting regulations, charity and company law, and the Trust's financial policies. • Maintain and strengthen the Trust's financial control environment, ensuring appropriate segregation of duties, authorisation processes and compliance checks are embedded. • Oversee VAT arrangements, including VAT claims, reconciliations and compliance with HMRC requirements. • Lead banking, payments and credit card administration, ensuring appropriate controls, approvals and reconciliations are in place. • Oversee fixed asset register transactions and ensure appropriate financial records are maintained. <p>Finance Systems and Process Improvement</p> <ul style="list-style-type: none"> • Lead the development and delivery of consistent, centralised finance processes across the Trust, ensuring schools receive a high-quality, responsive and efficient finance service. • Review financial processes, systems and reporting arrangements, identifying opportunities to improve consistency, efficiency, accuracy and compliance. • Manage the Trust's finance systems, including user access, process controls, data integrity and opportunities for system improvement. • Develop clear financial guidance, procedures and training materials to support consistent practice across schools and the central team. • Provide training, advice and support to colleagues involved in financial management, budget monitoring and financial administration. • Promote a culture of continuous improvement, ensuring the finance function evolves in line with Trust growth, changing requirements and sector best practice. <p>Audit, Compliance and Risk Management</p> <ul style="list-style-type: none"> • Coordinate internal and external audit processes, acting as a key point of contact and ensuring the timely provision of accurate evidence and information. • Support the CFO in ensuring compliance with the Academy Trust Handbook, DfE requirements, accounting standards and Trust financial regulations. • Identify and escalate financial risks, control weaknesses and compliance issues, recommending appropriate actions and improvements. • Support preparation of reports and evidence for the Audit and Risk Committee, Finance Committee, Executive Team and Trustees. • Ensure finance processes support regularity, propriety and value for money across the Trust. <p>Leadership and Stakeholder Engagement</p> <ul style="list-style-type: none"> • Provide leadership, direction and support to the central finance team, ensuring clarity of priorities, effective workflow and high standards of service delivery.
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	<ul style="list-style-type: none"> • Build strong and trusted working relationships with Headteachers, school leaders, budget holders, trustees and central team colleagues. • Present complex financial information clearly and confidently to non-finance colleagues, enabling informed decision-making and stronger financial understanding across the Trust. • Provide professional challenge and support to school leaders and budget holders to promote effective financial management and value for money. • Work collaboratively with other central functions to provide a joined-up Trust-wide service to schools. <p>Trust Growth and Development</p> <ul style="list-style-type: none"> • Support the CFO with financial due diligence, transition planning and onboarding arrangements for schools joining the Trust. • Support schools transferring into the Trust, including finance transition planning, systems setup, budget review and process alignment. • Contribute to the development of finance structures, systems and reporting as the Trust grows. • Support the identification of additional funding, income generation and efficiency opportunities. • Deputise for the CFO as required, representing the finance function professionally and confidently.
<p>Additional Duties</p>	<p>Undertake any other duties commensurate with the seniority and scope of this role, as required by the CFO, Executive Team or Trustees, to support strong financial stewardship, effective governance, continuous improvement and the continued success of Waterton Academy Trust.</p>
<p>Expectations of All Employees</p>	<ul style="list-style-type: none"> • 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
<p>Working Conditions</p>	<p>Flexible working arrangements are in place, with a working schedule to be agreed with the successful candidate.</p>
<p>Characteristics of the Post</p>	<p>Employees are encouraged to participate in training activities in order to enhance their own personal development.</p> <p>The employment checks are required:</p> <ul style="list-style-type: none"> • 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

	<ul style="list-style-type: none">• Registration with appropriate bodies (where applicable) <p>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.</p>
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Person Specification – Head of Finance

AF: Application Form

OT: Occupational Task

CQ: Certificates/Qualifications

I: Presentation

I: Interview

R: Reference

Qualifications	Essential	Desirable	Assessed
Good general education, including English and mathematics at GCSE grade C/4 or above, or equivalent.	X		AF, CQ
AAT Level 4, part-qualified accountant, qualified by experience, or equivalent relevant experience in a senior finance role.	X		AF, CQ, I
Degree or equivalent qualification in finance, accountancy, business or a related discipline.		X	AF, CQ
Evidence of continuing professional development relevant to finance, leadership, governance or academy trust operations.		X	AF, I
Experience	Essential	Desirable	Assessed
Significant experience of financial management, budgeting, forecasting and reporting within a complex organisation.	X		AF, I, OT, R
Experience of managing significant financial resources and supporting medium-term financial planning.	X		AF, I, R
Experience of preparing and presenting management accounts and financial reports to senior leaders or governing bodies.	X		AF, I, OT, R
Experience of developing and improving financial systems, processes and reporting arrangements across a multi-site organisation.	X		AF, I, R
Experience of leading or managing a finance team, including workflow, performance and service delivery.	X		AF, I, R
Experience of working with senior leaders and budget holders to develop financial understanding and support effective decision-making.	X		AF, I, R
Strong understanding of financial controls, compliance, regularity, propriety and value for money.	X		AF, I, R
Understanding of academy trust finance, including the Academy Trust Handbook, DfE requirements and relevant accounting expectations.		X	AF, I, R
Experience of managing finances within a multi-academy trust, school, public-sector or similarly regulated environment.	X		AF, I, R
Experience of leading or coordinating internal and external audit processes.		X	AF, I, OT, R
Experience of VAT management, reconciliations and HMRC compliance.	X		AF, I, R
Knowledge of academy funding arrangements and sector financial challenges.	X		AF, I, R
Experience of financial modelling, scenario planning or option appraisal.		X	AF, I, R
Experience of supporting schools or business units through transition, onboarding, growth or structural change.		X	AF, I, R
Skills	Essential	Desirable	Assessed

Ability to produce accurate, timely and clear financial information for a range of audiences.	X		AF, I, R
Ability to interpret complex financial information and present it clearly to non-finance colleagues, senior leaders and trustees.	X		AF, I, R
Strong analytical skills, with the ability to identify trends, risks, variances and areas for improvement.	X		AF, I, OT, R
Ability to provide constructive challenge and professional advice to support sound financial decision-making.	X		AF, I, R
Ability to lead a joined-up, Trust-wide finance service that balances central consistency with the needs of individual schools.	X		AF, I, R
Strong systems-thinking skills, with the ability to identify process improvements, strengthen controls and support effective implementation.	X		AF, I, R
High level of IT literacy, including confident use of Microsoft Excel and finance/accounting systems.	X		AF, I, OT, R
Ability to prioritise effectively, manage competing deadlines and maintain high standards under pressure.	X		AF, I, OT, R
Ability to build effective working relationships with colleagues, school leaders, trustees and external stakeholders.	X		AF, I, R
Ability to work proactively, use initiative and exercise sound professional judgement.	X		AF, I, R
Knowledge and Understanding	Essential	Desirable	Assessed
Strong understanding of academy trust finance, including the Academy Trust Handbook, DfE requirements, regularity, propriety and value for money.	X		AF, I, R
Strong understanding of school and academy funding arrangements, including how funding, pupil numbers, staffing structures and sector pressures inform budget setting, forecasting and medium-term financial planning.	X		AF, I, OT, R
Sound knowledge of financial controls, risk management, audit expectations and the importance of maintaining a robust control environment.	X		AF, I, R
Knowledge of financial reporting requirements, including management accounts, year-end processes, reconciliations and statutory returns.	X		AF, I, OT, R
Understanding of how financial information can be used to support strategic decision-making, school improvement and effective resource allocation.	X		AF, I, R
Knowledge of finance systems and how they can be used to improve consistency, efficiency, reporting and internal controls across a multi-site organisation.	X		AF, I, R
Awareness of VAT, payroll, banking and procurement requirements within an academy trust or similar public-sector environment.	X		AF, I, R
Understanding of change management and continuous improvement within a finance or business services function.	X		AF, I, R
Awareness of the financial implications of Trust growth, school onboarding, due diligence and organisational change.		X	AF, I, R

Experience of using Access Education Finance, or similar academy finance/accounting software. Desirable		X	AF, I, R
Personal Attributes	Essential	Desirable	Assessed
Proactive and self-motivated, with a solution-focused approach to strengthening financial systems, controls and service delivery.	X		AF, I, R
Collaborative team player with the ability to build strong, trusted relationships across the Trust, including with school leaders, budget holders, trustees and external partners.	X		AF, I, R
Resilient and adaptable, able to work under pressure, manage competing priorities and respond positively to changing financial and organisational demands.	X		AF, I, R
Committed to strong financial stewardship, effective governance, value for money and the responsible use of public funds to support pupil outcomes.	X		AF, R, I
Professional, reliable and approachable, with high levels of integrity, confidentiality and sound judgement.	X		AF, R, I
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 6th July 2026 – midday

Shortlisting: Friday 10th July 2026

Interviews: Tuesday 14th July 2026

Start Date: As soon as possible

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.