



Head of Business and Finance

Information Pack



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Message from the CEO, Nicola Wells



I am delighted that you are considering joining the University of Winchester Academy Trust in the role of Head of Business and Finance. This is an exciting opportunity for the right candidate to join me, our central team and the Trustees in the next stage of our Trust's growth and to build on our existing reputation as an innovative and creative learning environment.

The University of Winchester Academy Trust (UWinAT) is currently a family of 8 schools. Our Sponsor the University of Winchester is recognised for its outstanding practice in teacher training and this supports our schools to develop excellent practice.

I have been involved with the Trust since 2017 long before our two brand new schools opened in 2020 and have a clear vision for our future development. Over the past 12 months we have welcomed another three schools into our family, and the central team now needs to expand and strengthen the delivery of outstanding back-office services to our schools.

Our Trust is an exciting and supportive place to work and we pride ourselves on offering career development opportunities to all.

To find out more about our Trust and our family of schools please visit our website [University of Winchester Academy Trust - Home](#)

If you feel you are the right person to join us on our journey as Head of Business and Finance I would encourage you to contact me for an informal conversation and arrange to visit our Trust Offices based at Halterworth Primary School.

I look forward to hearing from you.

A handwritten signature in blue ink that reads "Nicola Wells". The signature is written in a cursive, flowing style. Below the signature, there is a faint, light blue rectangular stamp or watermark.

Nicola Wells
CEO
University of Winchester Academy Trust
Email: CEO@uwinat.co.uk
Tel: 01794 512028 (Option 3)

Our Vision

To be a beacon of educational excellence, where curiosity is ignited, creativity is championed and character is formed – in every child, in every school, every day.



Our first brand new schools, Barton Farm and Stoneham Park opened in September 2020 and have successfully grown year on year. Our Beehive Preschool at Barton Farm will soon be moving to its own building within the school grounds so as to allow it to expand its provision to the local community. Our three Romsey primary schools of Awbridge, Wellow and Halterworth joined the Trust in December 2020 having already been working in close collaboration with each other and the

University. As a Trust of five schools, we were able to strengthen working relationships, develop our strategic direction and consolidate our governance structures.

It was always the Trustees' vision to grow the Trust in such a way so as not to negatively impact the quality of education or services and support provided to its schools.

Over the past 12 months the Trust has been joined by North Waltham Primary School, in May 2025 and by Droxford Junior and Orchard Infant Schools in November 2025. This brings the total number of pupils to just over 2000, with two successful preschool facilities and engaging and varied wraparound care programmes across our eight schools.

The success of all our schools is confirmed by Good or Outstanding Ofsted ratings. Our staff teams work incredibly hard to ensure that our pupils consistently outperform national educational benchmarks. We are also proud to support local schools in need through the DfE RISE support programme.

Our governance framework is key to good communication, collaboration and compliance and is supported by our Scheme of Delegation. We are very fortunate to have Trustees with a variety of exceptional skills which they bring to their voluntary roles with a united passion for improving the opportunities for pupils and the whole school community. Our Trust Board delegates certain duties to committees where Trustee expertise is targeted to support our senior leaders in the day-to-day management of Trust activities. Each School has its own Local Academy

Committee and key roles within each layer of governance meet to share information and knowledge.

Our estate provides a mixture of challenges with buildings that include classical Victorian village schools, traditional 60's and 70's builds and modern purpose-built properties. We are very fortunate that all our school's benefit from good outside spaces where children can enjoy both learning and recreational opportunities. Our forest school activities are a firm favourite in all our schools.



We even have chickens!

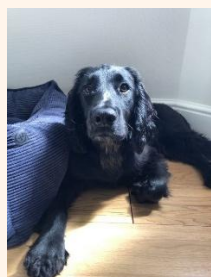
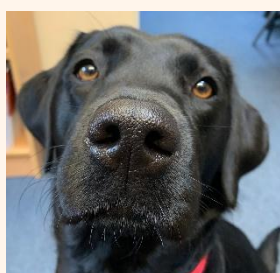


All our schools have a strong commitment to sustaining our environment. A number of our schools have achieved their Eco Schools Award and sustainability is woven into curricular and non-curricular activities right across the Trust. Climate action plans form a key part of the strategic priorities over the next few years.

Education finances are always a hot topic and the current climate is no exception. Our schools and parents work hard to boost school budgets in so many innovative ways allowing us to purchase those items which sit on the wish list rather than the essentials list. The central team focus on capitalising the economies of scale opportunities that being a multi academy trusts brings but this is an ongoing process. The next stage of growth of the Trust will be pivotal in embedding efficiencies, resourcing more effectively and expanding our income streams to support the creative learning both in and out of the classroom.

And we can't ignore the amazing work our four-legged friends do supporting our more vulnerable pupils. Who could resist faces like these!

Luna, Paddy, Annie and Monty



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Why work for the Trust?



Working for UWinAT provides opportunities to:

- ✓ work as part of a multi academy trust which is large enough to effectively support our schools but small enough to know and care for them individually
- ✓ work for a Trust which takes staff wellbeing seriously
- ✓ work with supportive colleagues
- ✓ join the Local Government Pension Scheme (17 % and 50/50 option)
- ✓ work for a Trust that recognises continuous service with Local Authorities and other Academy Trusts
- ✓ take advantage of Cycle to work scheme pending
- ✓ take part in both individual and trust wide CPD opportunities

[University of Winchester Academy Trust - UWinAT Support Staff Career Development](#)



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The Role

Head of Business and Finance

Based at Halterworth Primary School

Full time – 37 hrs per week, 52 weeks per year

Salary – competitive based on experience

Due to our current CFOO stepping back after a long career in education we are in a position to reevaluate our central team structures and provide an exciting opportunity for an experienced professional to join the team and play a central role in shaping the Trust's future.

Our Trust has grown steadily since 2020 when it opened with just two brand new schools. We now have eight academies based in and around Romsey, Winchester, Eastleigh and Southampton with a focus on primary and preschool education. Our unique relationship with the University of Winchester allows us to offer our children exciting, research led and creative ways to learn, whilst providing excellent professional development opportunities for our staff.



Our central team supports our family of schools across the functions of Finance, HR, Administration, SEND, Estates Management, Governance, Compliance and Health and Safety. We are a small team with one goal – to provide cost effective and efficient back-office services to our academies, supporting staff to deliver the very best outcomes for all our pupils.

We are looking for someone to lead our Business and Finance functions providing direction, oversight and support across key service areas. The ability to identify and implement process improvements with a focus on automation and efficiency is key whilst understanding that behind every decision are real lives, families and communities. We need someone who can call upon their experience to lead and develop the Trust business functions and support Trust growth.

Are you someone who is:

- Motivated by purpose and driven to make a meaningful difference in young people's lives
- Able to combine business acumen with strategic financial expertise with the ability to see the bigger picture
- An excellent verbal and written communicator
- An empathetic leader with a sense of humour
- Keen to be an integral part of the next chapter for UWinAT

If so, we would welcome the opportunity for an informal and confidential conversation and invite you to visit us prior to application.

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We can offer

- High quality professional development and leadership support
- Local Government Pension Scheme (including 17.9% employer contribution and 50/50 option)
- Confidential wellbeing support services
- General annual leave, increasing with service
- The chance to work with amazing colleagues within a supportive team environment

We guarantee that no two days will be the same but every day will make a difference!

**UNIVERSITY OF WINCHESTER ACADEMY TRUST
JOB DESCRIPTION**

Job Title:	Head of Business and Finance
Location:	Based at Trust Offices, Halterworth Primary School, Romsey
Reporting To:	CEO
Hours:	37 hours per week, 52 weeks per year
Salary Range:	Grade H

Main Purpose of Job:

1. To provide high quality strategic financial and operational planning and advice to the CEO and Trustees ensuring the Trust makes best possible use of its resources and is able to provide the best outcomes for its pupils.
2. To lead in the design and implementation of business systems, related policies and procedures, ensuring compliance with all legislation relating to the Trust.
3. To support Trustees, senior leaders and finance staff to carry out their roles effectively and efficiently.
4. To support the Trust's growth, sustainability and long-term planning
5. Contribute to the trust-wide organisational development, including growth planning, due diligence, integration of new schools and central service design where required.
6. To provide mentorship, coaching and performance management to ensure high performance and professional development for the central services team responsible for Finance, HR, Governance, Compliance
7. Working closely with the leader of the estates team to deliver the Trust strategic plans

Main Duties & Responsibilities

STRATEGIC ROLE

- Working closely with the CEO, UWINAT Trust Board and senior leaders in providing strategic vision and leadership across all non-educational functions of the Trust.
- To develop effective relationships with staff, trustees, governors, relevant businesses and other stakeholders.
- To advise the CEO, Trustees and senior leaders on the implications of finance and business-related government policies, local authority policies, academy trends and developments.
- To provide clear information, advice and recommendations to the CEO, Trustees and senior leaders regarding the strategic development of support services.

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- To ensure the Trust makes the best possible use of resources through effective planning and their economic, effective and efficient deployment.
- To oversee the project management of the conversion of both sponsored and converter academies into the Trust including undertaking due diligence where additional schools wish to join the Trust.
- In conjunction with CEO, develop and implement a robust marketing strategy for the Trust and its academies.
- To lead the development and maintenance of all finance and business-related Trust policies, ensuring compliance with all relevant statutory requirements.
- To attend Trust Board and Local Academy Committee meetings as required.
- Participate and represent the Trust in national and local networks of bursars/finance directors and managers, so that the trust is alert to new trends and is familiar with current best practice.

FINANCE ROLE

- To develop and oversee all financial policies and procedures to ensure compliance with the Academy Trust Handbook and Statement of Recommended Practices (SORP) of the Charities Commission.
- Maximise the effective use of public funds, grants and capital allocations, ensuring compliance with relevant academy, charity and company requirements.
- To oversee the production of a five-year financial plan for approval by the Board, working with the CFO, CEO, senior leaders, the Trust Board and governors to ensure Trust and Academy Development Plans are incorporated and appropriately resourced.
- To ensure appropriate internal audit functions are carried out for the Trust and all academies within the Trust and reported to the Audit and Risk Committee.
- Oversee the management of the Trust's cash position at all times, including authorisation of bank deposits and investment options in line with Trust policies.
- Identify and implement income generation initiatives across the Trust and its schools in line with Trust ethos and values.
- To ensure annual audits are carried out within statutory deadlines and advise Trustees to ensure appropriate approvals ahead of submission to DfE and Companies House.
- Oversee the work of the CFO to ensure recommendations from internal or external audit reports are implemented in a timely manner.
- Oversee the work of the CFO to ensure monthly budget monitoring procedures are carried out and that local academy committees are provided with accurate information in a format which is consistent.
- To oversee the processing and reconciliation of all financial data relating to Trust financial functions within agreed deadlines.
- Working with the CFO to prepare and submit all statutory financial statements and annual returns to DfE.

HUMAN RESOURCES

- To oversee the development of the central HR function, to ensure compliance and supporting the implementation of audit recommendations.
- Contribute to workforce planning, including staffing levels, allocation of staff and recruitment priorities, working closely with CEO, Senior Leaders and Trust Board.

ESTATES/HEALTH & SAFETY

- Support the work of the CEO and leader of the estates team to develop and implement strategies for premises management to ensure that the quality of the estate and the learning environment for pupils is sustainable, maintained and improved.
- Support the work of the leader of the estates team to identify and implement sustainable strategies to improve energy efficiencies across the Trust and meet Government targets for decarbonisation in Schools.
- Work with the leader of the estates team to support the trustees to discharge their responsibilities for Health and Safety across the trust and all its stakeholders.
- Work with the leader of the estates team and R W Safety Solutions to advise the trustees on policies and procedures relating to Health and Safety to ensure compliance with relevant legislation.

PROCUREMENT AND CONTRACT MANAGEMENT

- Prepare and implement policies concerning procurement and ordering of all Trust supplies and services to ensure best value for money.
- Manage and optimize all contracts for the Trust to including IT systems, MIS, Legal, HR and Payroll and Catering
- Support the work of the leader of the estates team to ensure contracts for H & S, cleaning, grounds maintenance, waste management, Term contractors and Utilities are managed effectively
- Identify operational efficiencies across the Trust.

LEADERSHIP AND MANAGEMENT OF STAFF

- Provide leadership, motivation, and support to Trust staff ensuring that high standards of professional behaviour are achieved.
- Identify finance and business-related training and development opportunities for Trust staff making recommendations as appropriate.
- Carry out the performance management of direct reports in line with Trust policies and procedures.

IT

- Develop and implement the Trust's IT strategy, aligning technology initiatives with educational goals and operational efficiency, supporting the Trust and its academies to meet the six DfE Digital & Technology standards by 2030.
- Oversee the maintenance and development of the Trust's IT infrastructure, ensuring reliable and secure systems across all academies.
- Implement robust cyber security measures to protect data and systems, ensuring compliance with relevant legislation.
- Lead IT projects from conception to completion, ensuring timely delivery within budget constraints.
- Establish and enforce IT policies and procedures promoting best practice and compliance across the Trust.
- Be responsible for the management of IT contracts including Broadband, support and social media ensuring a sustainable and cost-effective delivery across all platforms

GOVERNANCE/COMPLIANCE AND RISK MANAGEMENT

- Oversight of all non-educational related compliance matters across the Trust
- Lead on the identification and review of risks and actions to mitigate risk ensuring the Trust risk

register is up to date at all times

- Advise Senior Leaders on local risk management issues
- Oversee critical incident and business continuity planning across the Trust
- Support of the work of the Governance Professional ensuring compliance
- Work with the Governance Professional to ensure all statutory information is displayed on the relevant websites in accordance with the annual timetable of deadlines.
- Advise the Trust on insurance and financial and business-related risk management requirements

OTHER DUTIES

- Undertake such other duties as reasonably correspond to the general character of the post and commensurate with being a member of the Trust senior leadership team.
- Be fully aware of and understand the implications of safeguarding children and young people as this applies to the role within the organisation.

PERSON SPECIFICATION

Head of Business and Finance

Candidates should ensure that they meet the essential criteria for qualifications, experience and supporting evidence.

Educational and Professional Qualifications	Essential/ Desirable	Assessment
Educated to degree level	E	Application
Professional Qualifications in a relevant discipline (ADSBM, ACA, CIMA, CIPFA, ACCA, AAT or equivalent)	D	Application
Level 7 qualification in School Business Leadership or equivalent	D	Application
Evidence of continuous professional development	D	Application
Qualified Project Manager	D	Application
IOSH Managing Safely	D	Application
Experience		
Significant experience leading the strategic financial planning of an organisation	E	Application Interview
Experience of staff leadership and management including evidence of achieving performance improvement across diverse teams	E	Application Interview Reference
Experience of strategic business or service planning and the development of a growing business	E	Application Interview
Experience of the Academy Conversion process	E	Application
Experience of effectively managing a multi-million pound budget	E	Application Interview
Experience of procuring and managing services and contracts, ensuring that value for money and performance indicators are met	E	Application Interview
Successful track record of managing complex, significant projects from inception to completion	E	Application Interview

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Extensive experience working as a member of a senior team	E	Application Interview
Experience of asset and facilities management	D	Application Interview
Experience in an educational environment	D	Application Interview
Experience of working within a Multi Academy Trust	D	Application Interview
Track record of successful fund raising and profile raising activities	D	Application Interview
Knowledge		
Financial management processes and systems in a complex people-oriented organisation	E	Application Interview
Company and charity law, particularly governance, accounting and reporting requirements.	D	Application Interview
Government Policy around Academy conversion and Multi Academy Trust operations	D	Application Interview
Current Health and Safety legislation	E	Application Interview
Financial and regulatory requirements within publicly funded education	D	Application Interview
Understanding of relevant employment legislation	D	Application Interview
Skills and Personal Attributes		
Excellent communication skills at all levels	E	Application Interview
Excellent numeracy skills	E	Application Interview
Strong IT skills across all common and industry specific programmes	E	Application Interview Reference
Good financial analysis and risk management skills	E	Application Interview
Demonstrable ability to work strategically and to develop and implement creative solutions	E	Application Interview
Inspirational leadership skills, utilised to positively and productively challenge colleagues, peers and teams	E	Application Interview
A track record of establishing and maintaining excellent internal and external organisational working relationships	E	Application Interview
Resilience within a highly pressurised environment	E	Application Interview
Committed to equality	E	Application Interview
Ability to work across multiple sites, regularly travelling between settings	E	Application Interview
Ability to make and substantiate difficult decisions	E	Application Interview

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Exemplary levels of integrity	E	Application Interview
Willingness and ability to attend Board and other meetings outside normal working hours	E	Application Interview
Commitment to safeguarding and promoting the welfare of all	E	Application Interview



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How to Apply

Closing date for applications: 1700hrs, Friday 11th June 2026

Visit the Trust:

For an informal conversation about the post or to arrange to visit our Trust Offices please contact Nicola Wells, CEO by email on ceo@uwinat.co.uk or by telephone on 01794 512028 (Option 3)

Application Procedure:

Applications should be submitted on UWinAT application forms, individual CV's will not be accepted. If you currently work in a school or Trust, please ensure one of your references is from your current Headteacher. Application forms and further information about the Trust and its schools can be found on the UWinAT website:

[University of Winchester Academy Trust - Trust vacancies](#)

Completed application forms should be returned by the closing date to HR@uwinat.co.uk

Artificial Intelligence (AI) tools

We currently do not use AI tools in our recruitment processes; however, we understand that you may choose to use AI tools to help you with your application.

If you do, please remember:

- AI generated applications can often be generic and impersonal, which may not accurately reflect your qualifications, skills and experiences
- AI generated applications may lack the personal touch that human-written applications have, this may make you seem less engaged and interested
- Ensure the information provided genuinely represents your own voice and experience
- You must not provide false or misleading information
- If you rely too heavily on AI you might not develop the necessary skills to communicate your experiences and qualifications effectively in interviews or other stages of the hiring process. This may make you come across to the interviewer as a different person to the one that wrote the application form, and you may not be successful in the interview.

Safer Recruitment Statement

The University of Winchester Academy Trust is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment. We will ensure that all our recruitment and selection practices reflects this commitment. Candidates that are shortlisted will be subject to an online check. All successful candidates will be subject to an Enhanced Disclosure and Barring Service check (DBS) along with other relevant employment checks, including Children's Barred List. Prior to interview, an online search will be carried out on information that is publicly available as part of our due diligence on shortlisted candidates.

Interviews: To be held Friday, 19th June 2026

Start date: 1st September 2026

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**University of Winchester Academy Trust
Halterworth Primary School
Halterworth Lane
Romsey
SO51 9AD
Tel: (01794) 512028**

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