

CANDIDATE INFORMATION PACK

Director (Trustee)

Finance and Commercial

Board of Directors | Finance Committee | Voluntary role | Closing date: Monday 14th December

WICKERSLEY PARTNERSHIP TRUST.

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Believe Together, Learn Together, Succeed Together

We aspire to ensure all students leave our care able and qualified to play their full part in an ever-changing world.

1. Welcome

A very warm welcome to Wickersley Partnership Trust, and thank you for your interest in joining our Board.

Wickersley Partnership Trust (WPT) was founded in 2014 and I became CEO in 2018. Our Trust exists to further the interests of the young people we serve. Across 13 schools in Rotherham and Gainsborough, we aspire to ensure every student leaves our care able and qualified to play their full part in an ever-changing world. We are proud to be one school on many different sites.

Our Directors have ultimate responsibility for directing the affairs of the Trust. They make sure it is solvent, well run and delivering the charitable outcomes for which it was set up, and they hold me and my executive team to account for doing so.

We are looking for a Director with a senior background in finance, accountancy or commercial leadership to join our Board and its Finance Committee. With an annual income of £62.5 million, our job is to make sure every pound reaches pupils: setting balanced budgets, planning staffing from the curriculum outwards, buying well and finding new sources of income through our buildings and partnerships.

You do not need to have worked in education. We want someone who understands how organisations stay financially strong, who will ask the right questions with commercial insight, and who shares our commitment to safeguarding and to the children of our communities. First-time board members are very welcome, and we will give you a full induction.

This pack tells you about the Trust, our finances, the role and how to apply. You can learn more about us at wickersleypt.org. I would be delighted to hear from you, and I hope you decide to apply.



Helen O'Brien
Chief Executive Officer, Wickersley Partnership Trust

Why this role, why now

Like every school trust, we face rising costs and tight funding. Staffing is by far our largest cost, so our budgets must be built from the curriculum outwards. A new Academy Trust Handbook took effect in October 2026, and we want to grow our income through lettings and partnerships. The Board needs a Director who brings strong financial and commercial challenge, so that our schools stay sustainable for the long term.

2. About Wickersley Partnership Trust

Wickersley Partnership Trust is a multi-academy trust and an exempt charity regulated by the Secretary of State for Education (company number 08833508). We serve around 7,500 young people, almost all in Rotherham, South Yorkshire, with one school in Gainsborough, Lincolnshire, and we plan to grow, predominantly at primary level.

2014	13	7,500	5	£62.5m
founded	schools	young people	specialist SEND centres	annual income

Our vision	We aspire to ensure all students leave our care able and qualified to play their full part in an ever-changing world.
Our mission	WPT exists to further the interests of the young people that we serve.
Our ethos	We are one school on many different sites, with embedded inclusivity and high expectations for every pupil.
How we improve	System Leadership: colleagues whose responsibilities are delivered Trust-wide share skills, expertise and resources, so our schools are more effective, efficient, engaging and equitable than they would be alone.

Working in partnership

We believe schools and trusts achieve more together. We anchor the **Learners First Partnership**, work alongside other regional trusts in the **Positive Change Alliance**, whose Operational Excellence work brings together estates, finance, IT and governance leaders, and are a Futures Partner of the **Foundation for Education Development**.

3. Our strategic priorities 2026/27

Our Board has set five strategic priorities, delivered through our Action Plan 2026–2031. The right-hand column shows where this role makes its biggest contribution.

	Priority	Strategic focus	Where this role contributes
1	**Developing Leadership Excellence**	Leaders and governors drive an ambitious vision with clear accountability and collaborative governance.	Clear, timely financial reporting to the Board; financial capability in school leaders.
2	**Investing in Our Workforce, Driving Excellence Together**	A diverse, highly skilled team with professional development, clear pathways and manageable workloads.	**Affordable staffing and pay, including a market-aligned pay framework for corporate roles and a central cover reserve.**
3	**Ensuring Every Child Achieves and Is Ready for Their Next Step**	High expectations, excellent teaching and structural inclusivity, so every child thrives.	Funding for pupils with special educational needs reaching the front line quickly and transparently.
4	**Creating a Culture and Environment where Everyone can Flourish**	Wellbeing, safety and open communication at the centre, while adopting safe digital innovation.	Strong internal control and value for money.
5	**Sustaining Excellence Through Strong Partnerships**	Long-term viability through strong financial management, estates, effective systems and partnerships.	**Long-term financial planning, reserves and treasury management, procurement, PFI oversight, and new income through lettings and partnerships.**

4. Our schools

Thirteen schools, almost all in Rotherham, South Yorkshire, with The Gainsborough Academy in Lincolnshire.

Secondary	Primary
• Wickersley School and Sports College (with sixth form) • Rawmarsh Community School • Clifton Community School • Thrybergh Academy • The Gainsborough Academy	• Aston Hall Junior and Infant School • Aston Lodge Primary • Brinsworth Whitehill Primary • Foljambe Primary • Monkwood Primary • Rawmarsh Ashwood Primary • Rawmarsh Sandhill Primary • Thrybergh Primary

We also run multiple provisions and centres for pupils with special educational needs, disabilities and social, emotional and mental health needs, including the Arran Hill, Magna Lane and Brunswick Centres.

One school on many different sites

Colleagues share skills, expertise and resources across all our schools, so every pupil gets the same high-quality education and experiences wherever they learn.



5. Our finances, and why this role matters now

The Finance Committee advises the Board on all matters relating to the Trust's finances. It makes sure resources are well planned, monitored and spent with propriety, and that money follows our strategic priorities: budgets are set from the curriculum and the priorities outwards, not rolled forward.

The committee assures six objectives in the Trust's Action Plan 2026–2031, tracks ten financial measures on a one-page dashboard, and recommends the annual budget, three-year plan and accounts to the Board.

£62.5m	13	5–8%	5
annual income	schools planning with ICFP	reserves policy band (of income)	committee meetings a year

Where we are now

Curriculum-led planning

Every academy is moving to integrated curriculum and financial planning (ICFP), with three- to five-year forecasts.

A resourcing charter protects class sizes and teachers' non-contact time.

Stronger financial control

The committee reviewed our compliance with the Academy Trust Handbook 2026 as soon as it took effect.

An independent review of asset management in July 2026 gave substantial assurance.

Procurement

We are updating our procurement policy for the Procurement Act 2023 and introducing a Trust-wide contract register.

Buying is planned across the whole Trust to get the best value.

Cash and treasury

We are reviewing how we hold our cash balances, with a deposit-based treasury strategy that keeps a safe buffer and spreads deposits across banks.

Simpler school budgets

We are moving per-school costs such as licences, insurance and broadband into school budgets, at no extra cost to schools, so headteachers see the full cost of running their school.

Income and partnerships

We are centralising lettings so our buildings serve their communities and earn income, with a target of 5% growth a year.

Three of our schools are PFI buildings; the committee leads oversight of handback readiness.

What success looks like

A balanced budget and a credible three-year plan. Reserves held within policy. Staffing planned from the curriculum. Every contract good value. New income that serves our communities.

6. About the role

Role	Director (Finance and Commercial): a member of the Board of Directors, who are charity trustees and company directors
Committee	Finance Committee (chaired by Joe Diston)
Responsible to	Steve Calvert, Chair of the Board
Appointed by	The Members of the Trust (Article 50 of our Articles of Association)
Term	Four years, renewable (Article 64)
Time commitment	About one day a month. The Board meets about six times a year on Thursday evenings, 5.30–7.30pm. The Finance Committee meets five times a year (October; December, jointly with the Audit & Risk Committee, for the annual accounts; March; June; and July). There are also school visits, training and an annual development event.
Location	Meetings are held at our central office, Swanage Court, Rotherham, or online. We ask Directors to attend some meetings and visits in person.
Remuneration	Voluntary and unpaid. Reasonable expenses are reimbursed.

Role purpose

We are seeking a Director with a senior background in finance, accountancy or commercial leadership. You will strengthen the Board's financial challenge on budgets, integrated curriculum and financial planning, benchmarking, procurement and new income, including lettings and partnerships, so the Trust stays financially sustainable for the long term.

Directors, as a group and as individuals, are responsible for the governance and strategic direction of the Trust, its financial health, the probity of its activities as a charity, and the achievement of its objects, in line with the Articles of Association, the Funding Agreement, the Academy Trust Handbook and the law.

Your responsibilities as a Director

Shared by every Director of Wickersley Partnership Trust.

- **Strategic leadership.** Set and champion the Trust's vision, ethos and strategy; agree the strategic priorities and how we measure them; make sure decisions are informed by risk.
- **Accountability.** Hold the CEO and executive leaders to account for the educational performance of the Trust and its pupils, and for the performance management of staff.
- **Financial oversight.** Make sure the Trust's money is well spent and that it remains solvent.
- **Engagement.** Listen to and engage with pupils, parents, staff, local governing bodies and the community.
- **Legal duties.** Act within the Trust's powers and promote its objects; exercise independent judgement and reasonable care, skill and diligence; avoid and declare conflicts of interest.
- **Safeguarding.** Share the Board's strategic responsibility for safeguarding and read Keeping Children Safe in Education each year.
- **Collective responsibility.** Prepare thoroughly, challenge constructively, support Board decisions once made and keep confidential business confidential.
- **Conduct and commitment.** Uphold the Seven Principles of Public Life and our Directors' Handbook and Code of Conduct; attend at least 75% of meetings; take part in school visits, training and the annual skills audit.

Your contribution to the Finance Committee

The specialist contribution we are looking for.

- **Budgets and forecasts.** Review and recommend the annual budget and three-year plan to the Board; scrutinise management accounts, forecasts and variances; and consider going concern.
- **Reserves and sustainability.** Oversee the Reserves Policy (a 5–8% band of income, with a 5% minimum) and the plans that keep the Trust sustainable over the medium term; help shape the Investment and Treasury Management policies.
- **ICFP and value for money.** Use integrated curriculum and financial planning measures and DfE benchmarking to challenge efficiency; oversee the central services charge and how funding is shared between schools.
- **Procurement and income.** Review procurement strategy, including required DfE buying deals; support new income streams, lettings and community partnerships.
- **Pay and staffing costs.** Work with the HR & Staffing Committee to check that pay awards, executive pay and the staffing structure are affordable.
- **Accounts and policies.** Support approval of the annual accounts; review Pupil Premium and PE and Sport Premium spending; help approve finance policies such as Financial Procedures, Charging and Remissions, Gifts and Hospitality, Expenses, and Tender and Procurement.

Under our Terms of Reference, Trust employees cannot be members of the Finance Committee, and the committee's Chair cannot also chair the Board or the Audit & Risk Committee.

7. Your first year: what success looks like

We will agree these with you during your induction. The committee works to a common pattern: one focus item at each meeting, a one-page dashboard and a short report to the Board.

By the end of your first year	How we will know
Induction completed, including meetings with the CEO, the committee Chair and the finance team, and visits to schools	Induction signed off by the Chair
Baselines agreed for the committee's finance dashboard (budget, reserves, cash, staffing costs, ICFP measures)	Dashboard in use at every committee meeting
Challenge on ICFP assumptions for the 2027/28 budget	Budget built from the curriculum, with class sizes protected
Input to the 2027/28 budget and three-year plan	Balanced budget recommended to the Board in July 2027
Commercial challenge on procurement and the new contract register	Contracts compliant and value for money evidenced
Support for new income from lettings and partnerships	Lettings income growing in line with target

8. What you will gain from the role

Being a Director is a significant responsibility, and it is voluntary. It also brings real rewards, both for you and for the young people we serve.

Make a real difference

Help shape the education and life chances of around 7,500 young people across 13 schools in Rotherham and Gainsborough.

See the impact of your decisions when you visit our schools.

Board-level experience

Serve as a company director and charity trustee of a £62.5 million organisation, alongside experienced Directors and executive leaders.

Valuable experience for a non-executive or board career.

Learning and development

A full induction, a buddy Director and ongoing training through the National Governance Association's Learning Link and Trust briefings.

Insight into how the education sector and its regulators work.

Networks and partnerships

Meet leaders from across the region and beyond through our work with the Learners First Partnership, the Positive Change Alliance and the Foundation for Education Development.

Put your expertise to work

Gain finance committee experience in a £62.5 million publicly funded charity.

Learn how academy funding works and bring commercial insight to long-term planning.

Flexible and supported

Most meetings are early evening, many can be joined online, and reasonable expenses are reimbursed.

Our Governance Professional supports every Director, and we are happy to write to your employer about time off for your governance role.

> Many employers value governance roles as professional development: they build strategic thinking, influence, scrutiny and teamwork, and show a commitment to the community.

9. Person specification

We will assess candidates against the criteria below. E = essential; D = desirable. A = application; I = interview; R = references.

Criteria	E / D	Assessed by
All Directors		
Commitment to the Trust's vision and to improving the life chances of children and young people	E	A, I
Ability to think strategically, analyse information and ask challenging questions	E	A, I
Understanding of, or willingness to learn, the role of a trust Director and the legal duties of company directors and charity trustees	E	I
Integrity, discretion and commitment to the Seven Principles of Public Life	E	I, R
Ability to work collaboratively as part of a team and accept collective responsibility	E	I, R
Time to attend Board and committee meetings, visits and training	E	A, I
Commitment to safeguarding and to equality, diversity and inclusion	E	A, I
Previous board or governance experience	D	A
Knowledge of the education sector or the local community	D	A, I
This role: Finance and Commercial		
Senior experience in finance, accountancy, audit or commercial leadership	E	A, I, R
Strong budget management skills and the ability to interpret management accounts, forecasts and financial statements	E	A, I, R
Commercial acumen and the ability to challenge financial strategy constructively	E	A, I, R
Willingness to learn the academy funding framework and the Academy Trust Handbook	E	A, I, R
Professional accountancy qualification (CCAB or equivalent)	D	A, I
Experience of income generation, business development, procurement or commercial partnerships	D	A, I
Experience of public sector or education finance, including ICFP or benchmarking	D	A, I
Experience of financial recovery or multi-year cost reduction	D	A, I

> First-time board members are welcome. You do not need to have worked in education: we will give you a full induction, a buddy Director and ongoing training.

10. How we are governed

Our Directors are both company directors and charity trustees. Governance has three tiers:

Members

Guardians of the Trust's constitution. Members appoint Directors, including this role, and hold the Board to account for effective governance.

Board of Directors

Sets the vision, ethos and strategy, holds executive leaders to account, and oversees money, risk and compliance. **This role sits here.**

Local governing bodies

Each school's local governing body supports and challenges its headteacher, with powers delegated by the Board.

The Board and its committees

The Board of Directors works through five committees. Each has Terms of Reference linked to our strategic priorities, a dashboard of key measures and a one-page report to the Board after every meeting, so that Board time goes on strategy and challenge rather than paperwork.

Committee	What it covers
Audit & Risk	Internal scrutiny, the Trust risk register, external audit, IT and cyber security, data protection and complaints
Finance	Budget and long-term financial planning, reserves, value for money, procurement and DfE financial returns
HR & Staffing	Pay, recruitment and retention, safer recruitment, wellbeing and workforce development
Education Standards	Outcomes, curriculum, SEND and inclusion, attendance, behaviour and safeguarding assurance
Estates & Compliance	Health and safety, statutory premises compliance, Martyn's Law, capital and condition, PFI, energy and carbon, lettings and educational visits

11. Our commitment to equality, diversity and inclusion

We want our Board to reflect the communities it serves. Applications from people from groups under-represented on boards, including women, people from ethnic minority backgrounds, disabled people and younger candidates, are particularly encouraged.

All appointments are made on merit through a fair and transparent process. Under the Equality Act 2010 the Trust may use positive action where candidates are equally suitable.

During the application process we commit to:

- paying for care and childcare while you attend an interview;
- paying your travel costs to interviews held in person;
- making any reasonable adjustments you need, for example arranging a sign language interpreter in advance;
- providing this pack in Word format;
- offering a first-stage interview to disabled applicants who meet the essential criteria for the role.

If there is anything else that would help you take part, please let us know.

12. Additional information

Conflicts of interest

All candidates will be asked to declare any interests, including any business connection with the Trust, its suppliers, banks, auditors or PFI partners. We will consider whether an actual conflict exists. Within 30 days of appointment, Directors complete a declaration of business interests, which is published on our website.

Eligibility and checks

Appointment is subject to an enhanced DBS certificate, a section 128 check, identity checks, Companies House identity verification, and confirmation that you are not disqualified from acting as a company director or charity trustee. Trust employees cannot be appointed to this role.

Induction and development

You will complete an induction within your first three months, including meetings with the Chair, CEO and Governance Professional, a buddy Director and visits to schools. Ongoing training is available through the National Governance Association's Learning Link and Trust briefings.

Our Code of Conduct

Directors sign the Directors' Handbook and Code of Conduct each year. It sets out how we behave as a Board, including our commitment to the Seven Principles of Public Life.

13. Selection process and how to apply

Applications are assessed against the person specification. Shortlisted candidates will be invited to:

- an informal conversation with the Chair of the Board and the CEO;
- a visit to one or more of our schools;
- a panel interview with the Chair of the Board, the Chair of the Finance Committee and the Governance Professional.

The panel's recommendation goes to the Members, who appoint Directors. References are taken up before appointment.

How to apply

Please send the following to our Governance Professional, at boardrecruitment@wickersleypt.org by 4pm on Monday 14th December:

1. a CV setting out your career history, responsibilities and achievements;
2. a covering letter (no more than two sides of A4) explaining why you are interested and how you meet the essential criteria in the person specification, with examples;
3. the names of two referees and how they know you. We will not contact referees without your consent.

Timetable

Stage	Date
Advert opens	Wednesday 25th November
Closing date	Monday 14th December
Shortlisting	w/c 14th December
Informal conversations and school visits	w/c 11th January
Interviews	w/c 11th January
Appointment by the Members	January 2027

Informal conversations

For an informal conversation about the role, please contact the Governance team at boardrecruitment@wickersleypt.org, who will arrange a call with the Chair of the Board or the CEO.

Safeguarding

Wickersley Partnership Trust is committed to safeguarding and promoting the welfare of children and young people, and expects all Directors to share this commitment. This role is subject to an enhanced DBS check and our safer recruitment procedures, in line with Keeping Children Safe in Education.